Prince Edward Island
TOURISM

Policy, Planning & Research

Economic Impact Tourism 2002

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Part 1. Introduction

Economic Impact: Tourism 2002 is Tourism PEI's annual report on visitations, visitor profiles and visitor expenditures for the mid-May to end of October tourism season. Throughout the season, visitor data are collected in several different ways with the data collection techniques designed to provide insights into a wide variety of visitor information, including:

1) visitor origins;
2) age;
3) employment status and income;
4) education;
5) party type and size;
6) primary purpose of visit;
7) travel motivators;
8) trip planning process;
9) mode of travel;
10) length of stay;
11) main overnight destination;
12) main type of accommodation used;
13) "day trip" travel patterns while visiting;
14) activities experienced; and
15) expenditures by key expenditure categories.

Part 2 of this report explains the methodology used to collect and analyze the data. **Part 3** is an overall summary for Prince Edward Island. **Part 4** provides a detailed profile of (1) pleasure visitors, (2) business visitors, (3) motorcoach visitors and (4) Japanese visitors. **Part 5** provides a profile of pleasure visitors by market origins. **Part 6** provides summary estimates and descriptive statistics covering overnight visitations, visitor profiles and visitor expenditures for each of Prince Edward Island's eleven tourism regions. ***It should be noted that due to the small sample size and resulting wide margins of error for some regions, readers should use this information with caution.***

Economic Impact: Tourism 2002 presents a small portion of the visitor data collected during the season. From the database of information available, special analysis can be conducted and reports generated. For more details and prices, contact the Policy, Planning and Research Division, Tourism PEI at 902-368-5907.

Part 2. Methodology

Tourism PEI's annual visitor and expenditure analysis is based on data collected through:

1) exit point intercepts;
2) follow-up telephone interviews;
3) on-Island, in-person motorcoach surveys;
4) on-Island, self-completed Japanese surveys; and
5) traffic data and analysis.

1. Exit Point Intercepts

From June through September, interviewers were stationed at Northumberland Ferries, Confederation Bridge and the Charlottetown Airport. Interviewers were stationed during daytime hours on a 3-day-on, 2-day-off rotation for each exit point.

At each exit point, interviewers attempted to intercept every fourth departing airport passenger or non-commercial vehicle. When the intercept was made, the interviewer first determined the contact's place of residence. Non-resident contacts were then asked the primary reason for their visit - pleasure or business - and an attempt was made to recruit the contact for a follow-up telephone interview. If the recruitment was successful, the interviewer then collected information for contacting the individual.

The database of intercepts collected is used to determine resident/non-resident ratios, business/pleasure splits and visitor origin party market share. In 2002, a total of 5,728 resident and 16,428 non-resident intercepts were made. From these non-resident intercepts, 13,287 or 81% agreed to participate in a follow-up telephone interview[1].

2. Follow-up Telephone Interviews

Follow-up telephone interviews were conducted among names randomly selected from the database of intercepts who agreed to be interviewed. North American interviews had a target completion window of 10 days from date of intercept, while attempts were made to complete international interviews within 30 days of intercept.

[1]While there are some operational limitations, the intercept methodology employed by Tourism PEI has been evaluated and determined to be sound by Statistics Canada.

Interviews were stratified; based on season - early shoulder, peak and late shoulder - pleasure/business ratio and visitor origin markets for pleasure. An allocation of the sample to individual strata was done in order to ensure that reliable data was available for each visitor origin market which represents 5% or more of visitors. These markets - Nova Scotia, New Brunswick, Quebec, Ontario and New England were each allocated a sample of 400, while Other Canada, Mid- Atlantic and Other US were each allocated a sample of 300. Two smaller visitor origin markets - Newfoundland and International - were each allocated a sample of 150. Business visitors were allocated a sample of 300.

To enhance data collection accuracy, telephone interviews were completed with the use of computer-aided telephone interview (CATI) software, and a 10% verification call-back process was followed.

In 2002, a total of 3,516 telephone interviews were completed. The margins of error were calculated at a confidence level of 95%.

		Total Interviews	Margin of Error
Business:		288	5.76%
Pleasure:	Newfoundland	155	7.85%
	Nova Scotia	412	4.82%
	New Brunswick	410	4.83%
	Quebec	394	4.93%
	Ontario	407	4.85%
	Other Canada	303	5.62%
	New England	399	4.90%
	Mid-Atlantic	308	5.56%
	Other US	301	5.64%
	International	149	8.01%

3. Motorcoach Surveys

Between June and October, departing motorcoach visitors were intercepted at their hotel/motel and surveyed about their stay in Prince Edward Island. The accommodations were randomly selected, but the sample was quota-based over the shoulder and peak periods. For 2002, 395 motorcoach visitor questionnaires were completed. With this sample size, there is a 95% level of confidence that values are accurate within a range of +/- 4.9%.

In support of the motorcoach survey, a survey of motorcoach accommodation operators was conducted by Tourism PEI to establish an estimate of the number of motorcoach visitors and room nights sold.

4. Japanese Surveys

Japanese language visitor questionnaires were distributed by Charlottetown-based Prince Edward Tours to their Japanese clients between June and October. These questionnaires were self-completed. Sampling was quota-based over the shoulder and peak periods. For 2002, 257 Japanese visitor questionnaires were completed. With this sample size, there is a 95% level of confidence that values are accurate within a range of +/- 5.95%.

In support of the Japanese visitor survey, a survey of known Japanese accommodation operators in Prince Edward Island was conducted to establish an estimate of the total number of Japanese visitors.

5. Traffic Data and Analysis

Traffic data were obtained from the Charlottetown Airport Authority, Strait Crossing Bridge Limited (SCBL) and Northumberland Ferries Ltd. (NFL). Passenger counts were provided by the Airport Authority, while NFL provided vehicle and passenger counts. SCBL provided vehicle counts, vehicle origin and passengers per vehicle data. Resident/non-resident splits, visitor origin ratios and average vehicle occupant and air party counts were then used to establish an estimate of the number of visitors.

Cruise ship data consisted of the number of passengers that actually came ashore and was provided by Transport Canada, Charlottetown Marine Terminal.

Survey data collected were analyzed using spreadsheet software and SPSS and Raosoft statistical software. The data were proofed and corrected for non-sampling errors. Pleasure visitor telephone survey data have been weighted by visitor origins for frequency counts and economic impact.

Part 3. An Island Summary

During the 2002 reporting period, it is estimated that a total of 413,565 pleasure and business parties spent a total of $352.9 million while vacationing or conducting business in Prince Edward Island (Exhibit 1 and 2).[2] This represents an increase of 1.5% in party numbers and a 7.5% increase in visitor expenditures compared to 2001.

Total visitors to Prince Edward Island decreased 3.0% from 1.185 million visitors in 2001 to 1.149 million visitors in 2002.[3]

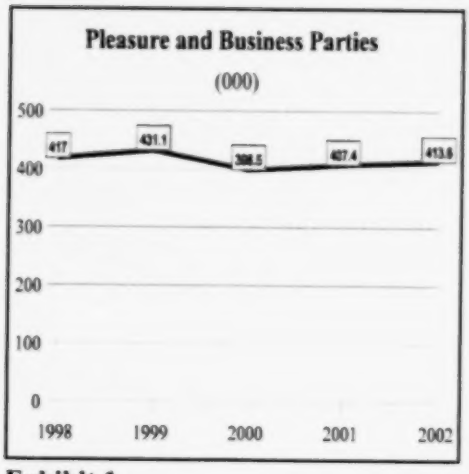


Exhibit 1

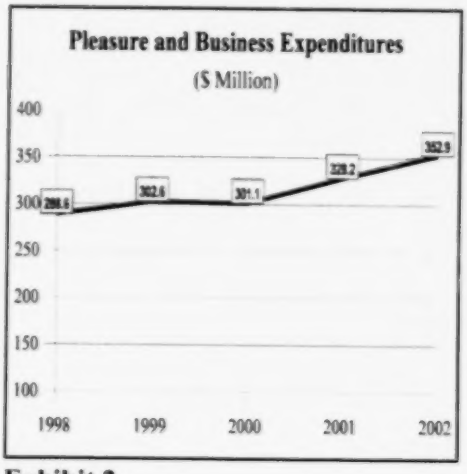
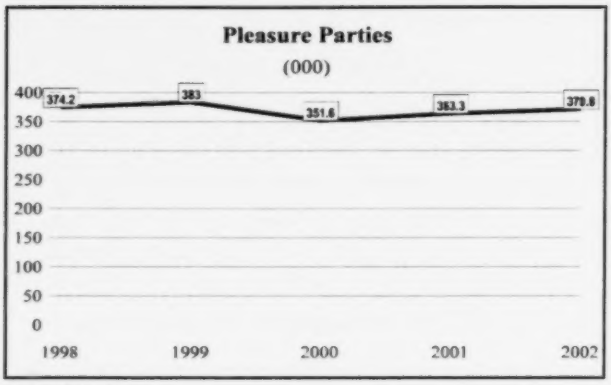


Exhibit 2

During the reporting period, a 1.4% decrease in motorcoach parties and a 3.9% decline in business parties was offset by an increase of 2.1% in pleasure parties (Exhibits 3, 4 and 5).

[2]Includes all auto, air and motorcoach parties.

[3]In 2002, cruise ship visitors increased these numbers by 19,313 visitors and $2,124,430 for an overall total of approximately 1.169 million visitors with expenditures of approximately $355 million.



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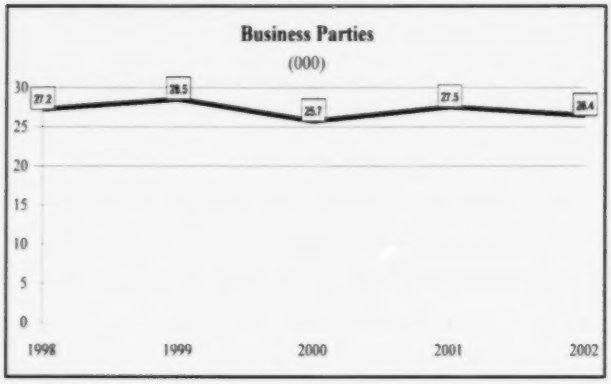

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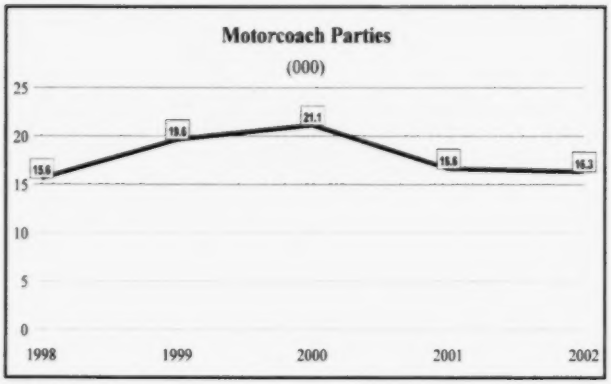


Exhibit 5

In 2002, pleasure parties (auto and air) accounted for approximately 90% of all visitor parties. For analysis purposes, pleasure visitors to Prince Edward Island are profiled in one of ten visitor origin markets: 1) Newfoundland; 2) Nova Scotia; 3) New Brunswick; 4) Quebec; 5) Ontario; 6) Other Canada; 7) New England (USA); 8) Mid-Atlantic (USA); 9.) Other USA, and 10.) International.

Based on these origins, the number of pleasure visitor parties for the past five years are summarized in Exhibit 6.

Pleasure Parties
(000)

	1998	1999	2000	2001	2002	Change*	Change**
Newfoundland	12.7	9.6	8.8	9.4	8.8	-6.4%	-12.9%
Nova Scotia	76.6	70.5	60.5	68.6	71.7	4.5%	3.8%
New Brunswick	49.6	33.7	39.1	36.0	34.8	-3.3%	-12.1%
Quebec	32.0	34.5	25.7	29.7	28.4	-4.4%	-6.9%
Ontario	95.5	105.7	90.5	96.4	99.7	3.4%	2.6%
Other Canada	25.4	28.7	28.2	29.1	30.0	3.1%	7.5%
New England	26.1	30.3	35.2	30.4	32.9	8.2%	6.1%
Mid-Atlantic	25.5	18.8	20.1	18.1	16.8	-7.2%	-19.6%
Other US	21.9	39.8	33.4	34.4	36.5	6.1%	7.0%
International	8.9	11.5	10.2	11.1	11.6	4.5%	11.5%
Total	374.2	383.0	351.6	363.3	370.8	2.1%	No change

Exhibit 6

*Percent change from 2001 to 2002.
**Percent change from previous four-year average.

Ontario continued to provide the largest share of pleasure parties in 2002 at 27%, followed by Nova Scotia at 19% and Other US at 10%. The market share enjoyed by each pleasure party origin in 2002 is given in Exhibit 7.

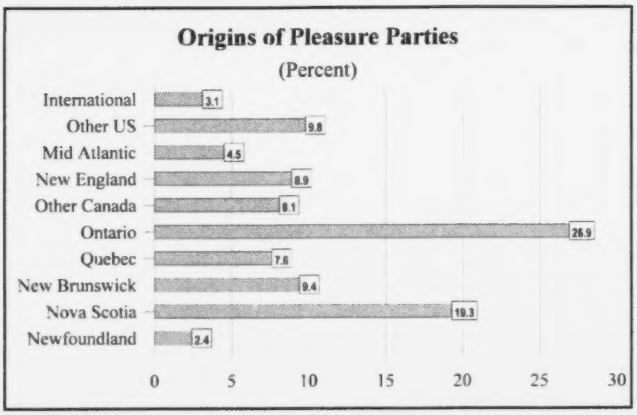


Exhibit 7

Each year, the follow-up telephone survey contains a "main overnight destination" question to identify the primary region where visitor parties stayed. The 2002 results are summarized in Exhibit 8 below. Due to the small number of responses in some regions, results are sensitive to year-to-year volatility in share of market.

Pleasure and Business Parties
"Main Overnight Destination"
(Percent)

Tourism Region	1999	2000	2001	2002
Beaches	6	5	6	5
Cavendish	25	22	23	24
Charlottetown	32	34	33	34
Eastern Kings	4	7	5	7
Evangeline	1	1	1	1
Kensington	3	2	4	3
New London	1	1	1	1
Southern Kings	6	5	7	6
South Shore	4	4	4	4
Summerside	10	9	8	9
West Prince	3	3	4	3
Did not overnight	3	4	5	3

Exhibit 8

Exhibit 9 contains a summary of the percent of pleasure and business visitors who are estimated to have visited selected tourism regions on day trips in 2002. These estimates do not include the number of visitors who overnighted in each area.

Pleasure and Business Visitors Estimate of Day Trip Visitations Outside Main Overnight Destination		
Region	**Percent of All Visitors**	**Number of Visitors**
West Prince/Evangeline	48	408,000
Summerside	53	450,000
North Shore	48	408,000
South Shore	40	340,000
Charlottetown	56	476,000
Eastern Kings	25	212,000
Southern Kings	47	399,000

Exhibit 9

Finally, Exhibit 10 on the next page summarizes visitations to Prince Edward Island between May 12 and October 31, 2001 and 2002.

Summary Visitation and Expenditure Estimates: May 12 to October 31										
Segment	**Percent of Parties**		**Number of Parties**		**Mean Party Size**		**Number of Visitors**		**Total Expenditures (Millions)**	
Pleasure	**2001**	**2002**	**2001**	**2002**	**2001**	**2002**	**2001**	**2002**	**2001**	**2002**
Newfoundland	2.6%	2.4%	9,410	8,759	3.26	3.17	30,373	27,767	$10.6	$9.1
Nova Scotia	18.9%	19.3%	68,631	71,670	3.43	3.01	239,121	215,728	$41.6	$46.0
New Brunswick	9.9%	9.4%	36,005	34,803	3.22	3.13	116,965	108,932	$19.7	$21.5
Quebec	8.2%	7.6%	29,719	28,356	3.07	2.90	90,678	82,233	$22.8	$26.6
Ontario	26.5%	26.9%	96,352	99,701	2.89	2.86	278,993	285,145	$87.6	$92.9
Other Canada	8.0%	8.1%	29,065	29,978	2.88	2.85	83,278	85,437	$28.4	$28.0
New England	8.4%	8.9%	30,410	32,948	3.00	2.82	91,783	92,913	$26.3	$32.2
Mid-Atlantic	5.0%	4.5%	18,057	16,776	2.75	2.61	50,144	43,786	$15.5	$15.8
Other US	9.5%	9.8%	34,442	36,525	2.74	2.69	91,783	98,287	$28.6	$32.9
International	3.1%	3.1%	11,118	11,627	2.87	2.48	31,367	28,835	$8.8	$9.6
Total Pleasure	89.2%	89.7%	363,317	370,814	3.04	2.88	1,104,485	1,067,960	$288.8	$313.6
Motorcoach	4.1%	3.9%	16,575	16,340	2.10	2.20	34,808	35,948	$21.2	$18.2
Business	6.7%	6.4%	27,481	26,405	1.66	1.72	45,619	45,417	$18.2	$21.2
Grand Total	**100%**	**100%**	**407,373**	**413,565**	**2.91**	**2.78**	**1,184,912**	**1,149,325**	**$328.2**	**$352.9**

Exhibit 10

Part 4. Prince Edward Island's Visitor Profiles

Section 1. Pleasure Visitor Profile

Section 2. Business Visitor Profile

Section 3. Motorcoach Visitor Profile

Section 4. Japanese Visitor Profile

Section 1. Pleasure Visitor Profile

Prince Edward Island experienced a 2.1% increase in the number of pleasure parties; however, the number of pleasure visitors showed a slight decrease of 3.3% over last year. Total expenditures by all pleasure visitor parties showed an increase of 8.6% from $288.8 million in 2001 to $313.6 million in 2002 (Exhibits 1 - 3).

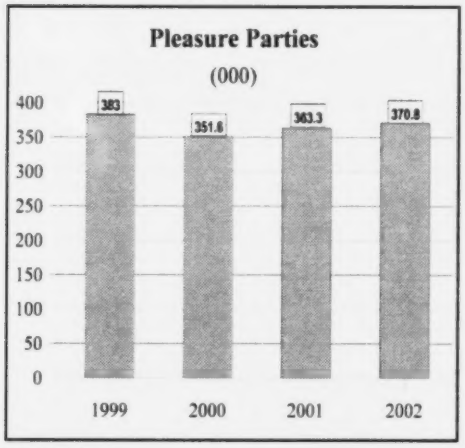


Exhibit 1

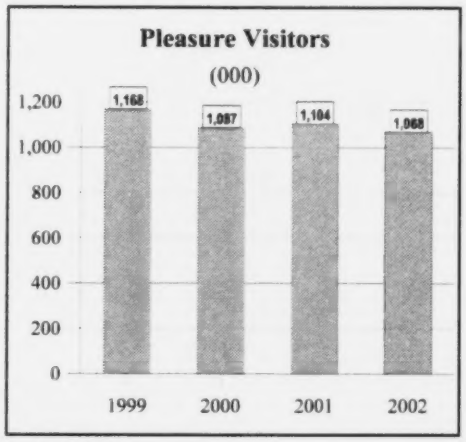


Exhibit 2

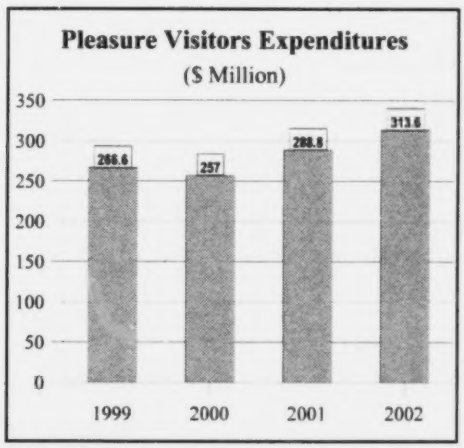
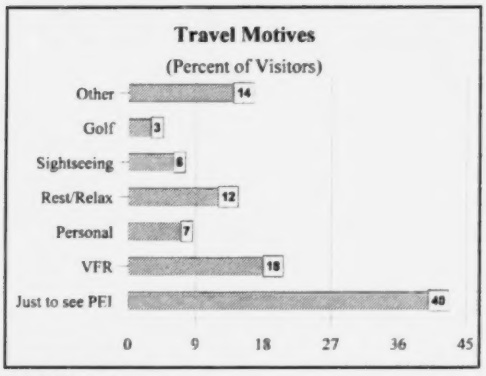


Exhibit 3

The main travel motives expressed by pleasure visitors included; just to see PEI (40%), visiting friends and relatives (18%) and rest and relaxation (12%) (Exhibit 4). A majority (59%) of pleasure visitors were repeat visitors to Prince Edward Island (Exhibit 5).



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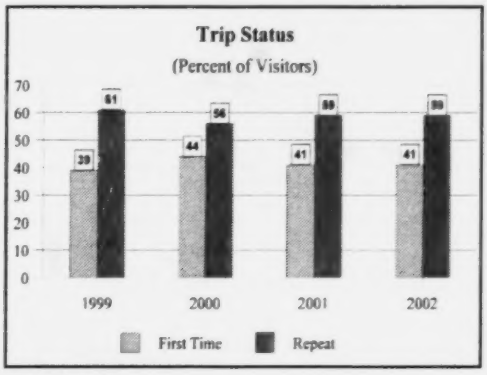


Exhibit 5

The majority (71%) of pleasure visitors made their decision to come to PEI more than four weeks prior to their departure. Less than one third (29%) of pleasure visitors made their decision to come to PEI four weeks or less before their departure (Exhibit 6).

In 2002, pleasure visitor party composition consisted of 47% adult couples, 28% percent family with children less than 18 years old, 20% groups and 6% single travellers (Exhibit 7).

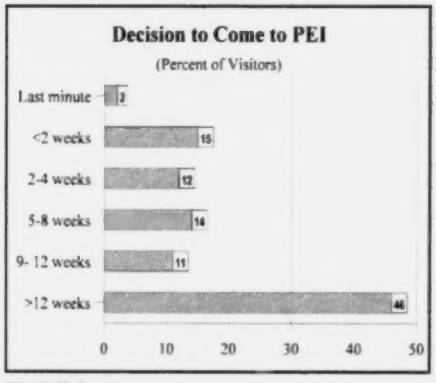


Exhibit 6

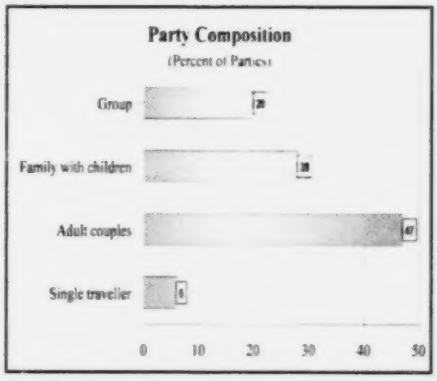


Exhibit 7

Party type by visitor origins is shown in Exhibit 8. Average party size showed a slight decline in 2002 to 2.88 persons compared to 3.04 persons in 2001. The continued decline in average party size for pleasure visitors during the past several years is illustrated in Exhibit 9.

	Pleasure Visitor Party Type (Percent of Parties)			
	Single Traveler	**Single Adult Couple**	**Family with Children <18**	**Group of Friends/Adults**
Newfoundland	3	40	37	20
Nova Scotia	7	39	32	22
New Brunswick	7	37	38	19
Quebec	4	50	28	18
Ontario	6	48	30	16
Other Canada	8	44	24	24
New England	5	55	21	19
Mid-Atlantic	4	59	16	20
Other US	5	57	16	22
International	7	58	19	16

Exhibit 8 * Numbers may not add to 100% due to rounding.

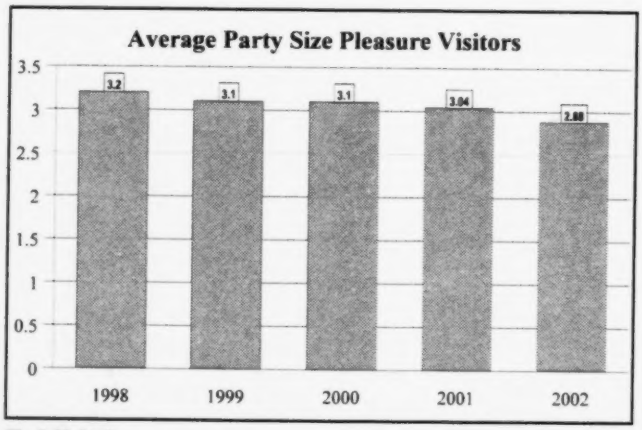


Exhibit 9

The predominant age group continues to be the 40-59 age group at 50% of the total. There was an even distribution of those less than 40 years of age at 24% and those 60 years and over at 26% (Exhibit 10).

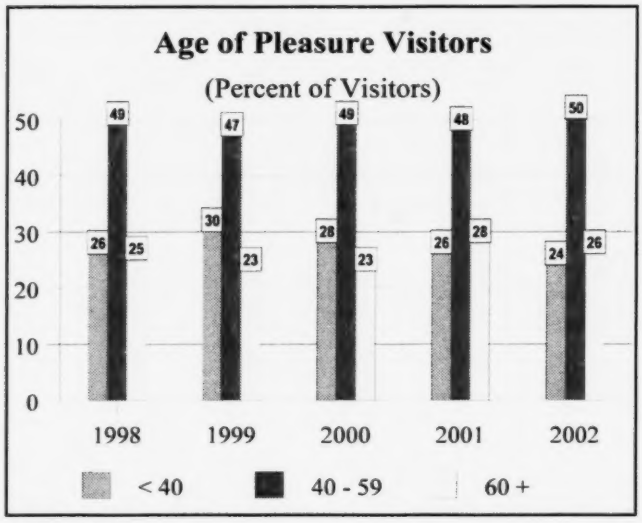


Exhibit 10

Seventy percent of pleasure visitors to PEI indicated their household incomes were greater than $50,000 a year (Exhibit 11).

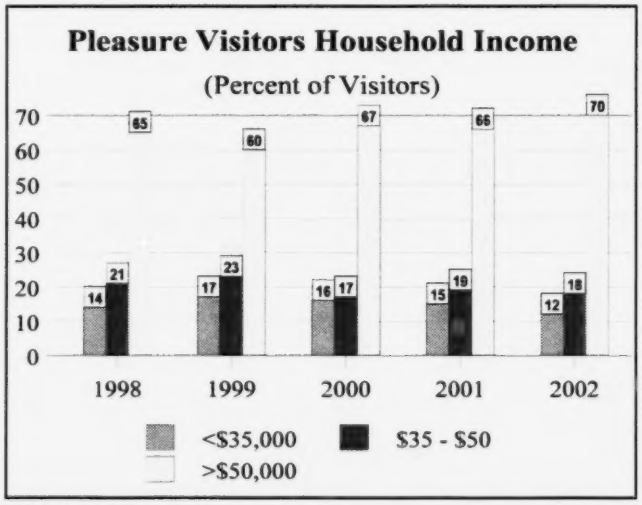


Exhibit 11

In 2002, 46% of pleasure visitors had achieved an undergraduate or post graduate degree. A further nineteen percent had graduated from community college or technical school, 15% had some post secondary education and the remaining 21% had high school or less (Exhibit 12). The majority (56%) worked full time while 27% were retired (Exhibit 13).

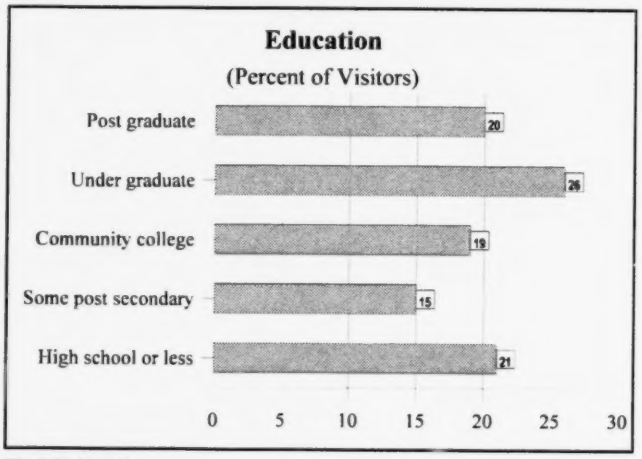


Exhibit 12

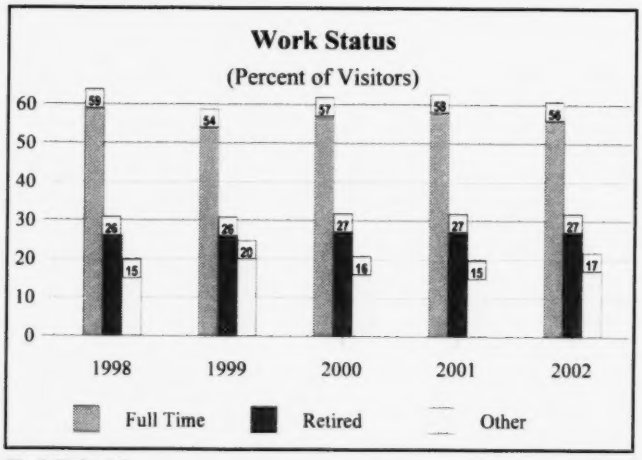
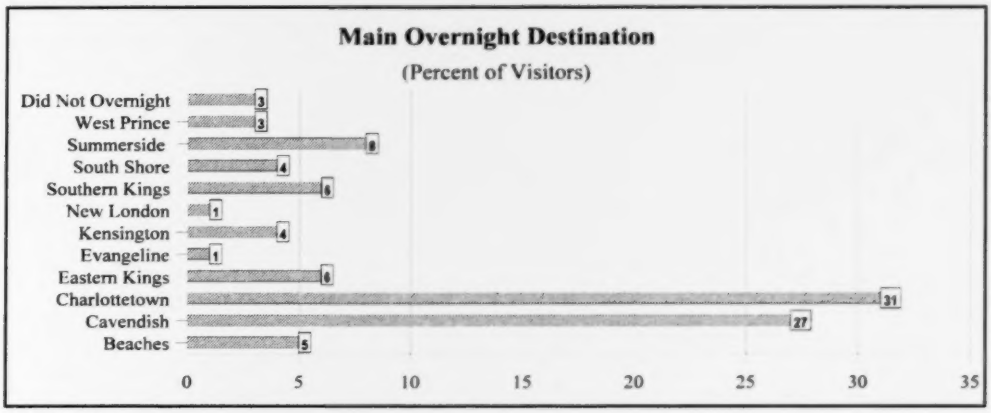


Exhibit 13

The 2002 survey of pleasure visitors indicates that the majority (58%) stayed in the Charlottetown and Cavendish tourism regions (Exhibit 14). The main type of accommodations used by pleasure visitors is given in Exhibit 15. Those staying in paid accommodations accounted for approximately 81% of the market.



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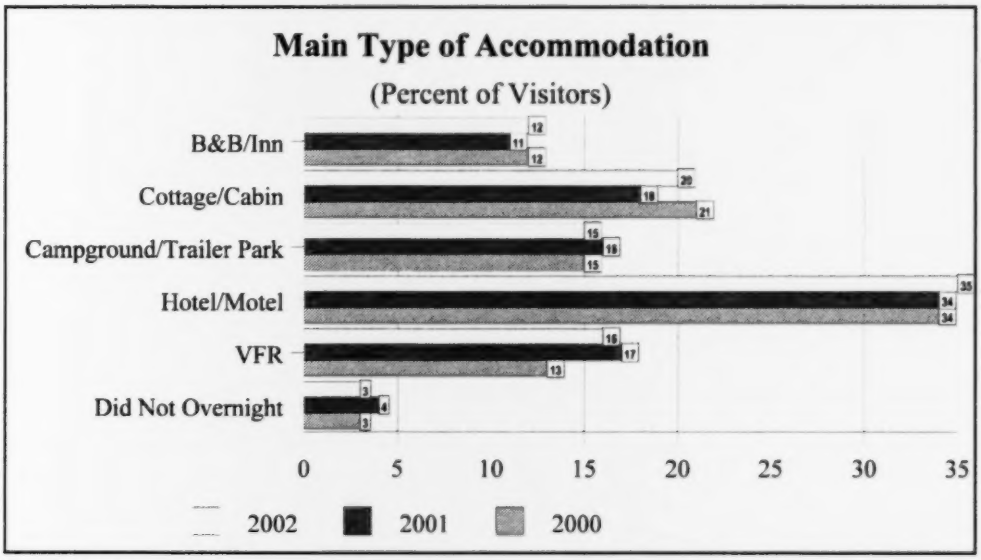


Exhibit 15

In 2002, it is estimated that the share of trip nights decreased to 45% in 2002, while the average length of stay among pleasure visitors remained relatively stable at just over 4.5 nights (Exhibit 16).

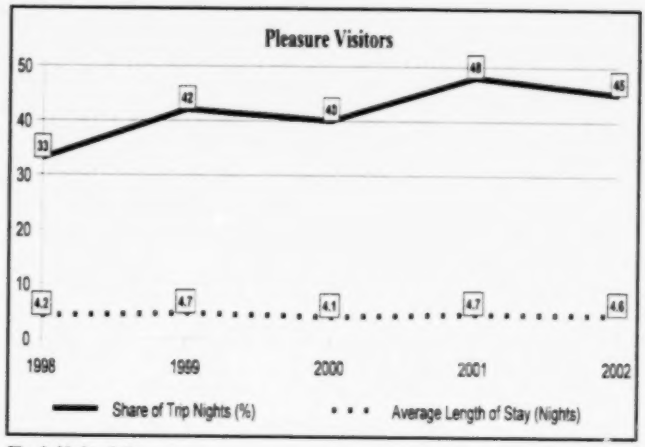


Exhibit 16

Exhibit 17 is a summary estimate of the percent of pleasure visitors who visited selected tourism regions on day trips. These estimates do not include the number of pleasure visitors who overnighted within each tourism area.

Pleasure Visitors Estimate of Day Trip Visitations Outside Main Overnight Destination		
Region	**Percent of All Visitors**	**Number of Visitors**
West Prince/Evangeline	47%	397,000
Summerside	52%	439,000
North Shore	42%	354,000
South Shore	41%	346,000
Charlottetown	58%	489,000
Eastern Kings	26%	219,000
Southern Kings	47%	397,000

Exhibit 17

According to Exhibit 18 the primary activities experienced by pleasure visitors were: soft outdoor adventure (84%), sightseeing (81%), beach visits (71%), and craft shopping (69%).

	Pleasure Visitor Activities				
	1998	**1999**	**2000**	**2001**	**2002**
Acadian Culture	20%	29%	22%	29%	26%
Anne/Lucy Maud	50%	43%	39%	40%	41%
Beach Visits	74%	72%	71%	69%	71%
Camping	20%	19%	18%	19%	19%
Craft Shopping	85%	73%	75%	70%	69%
Festivals/Events	17%	24%	29%	24%	22%
Fun/Theme Parks	26%	24%	23%	20%	19%
Golf	12%	13%	17%	17%	17%
History/Culture	47%	44%	40%	42%	41%
Live Theatre	13%	18%	18%	18%	16%
Lobster Suppers	48%	45%	42%	45%	45%
National Park	69%	52%	50%	52%	55%
Soft Outdoor Adventure *	61%	85%	84%	86%	84%
Sightseeing	93%	81%	79%	77%	81%
General Merchandise Shopping	52%	53%	56%	52%	55%

Exhibit 18 * Includes bird watching, boating, Confederation Trail, cycling, fishing and hiking

In terms of where visitors spent money in 2002, two expenditure items, accommodations (33%) and meals in restaurants and take-outs (22%) accounted for more than one half of all expenditures (Exhibit 19).

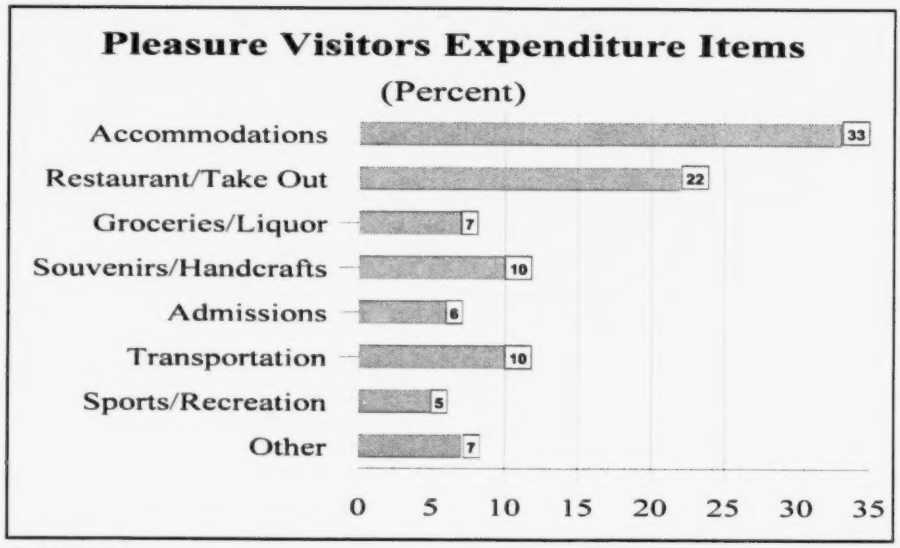


Exhibit 19

Section 2. Business Visitor Profile

Visitations by business parties and visitors has remained relatively stable for the last three years. Total expenditures by business visitors showed an increase of 16.2% from $18.2 million in 2001 to $21.2 million in 2002 (Exhibits 1-3). The origins of business visitors for 2002 is given in Exhibit 4.

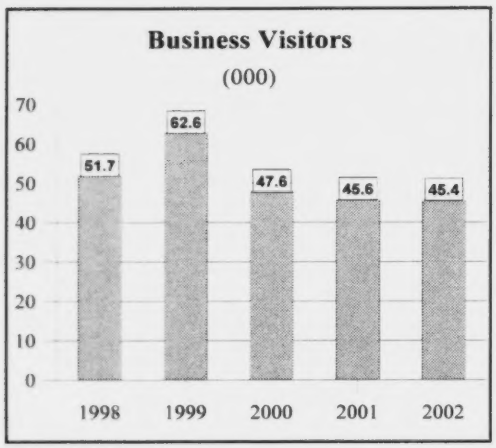


Exhibit 1

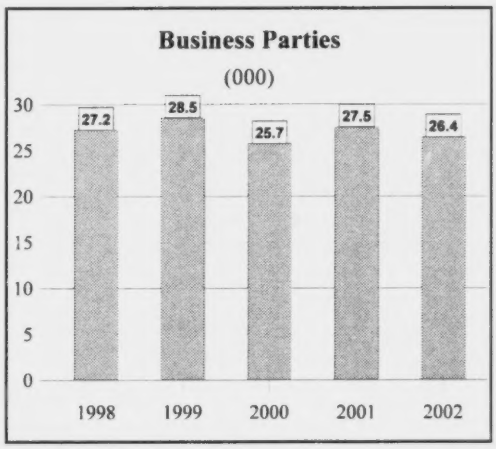


Exhibit 2

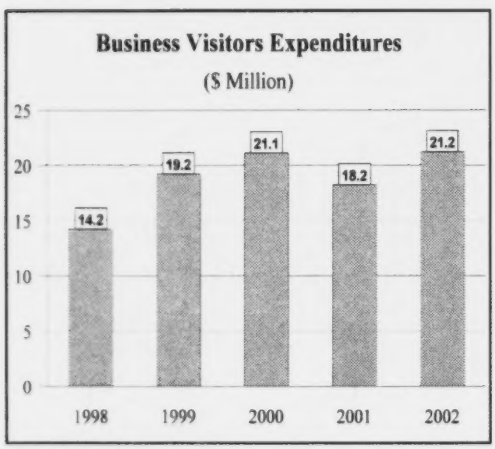


Exhibit 3

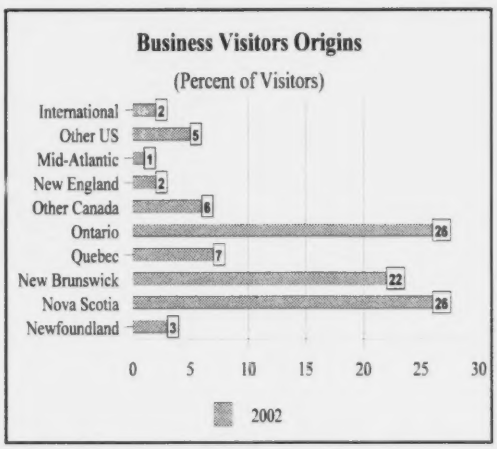


Exhibit 4

The main trip motives expressed by business visitors included meetings (25%), conventions (21%), client service trip (18%) and sales call (9%) (Exhibit 5). A large majority (79%) of business visitors were repeat visitors to Prince Edward Island (Exhibit 6).

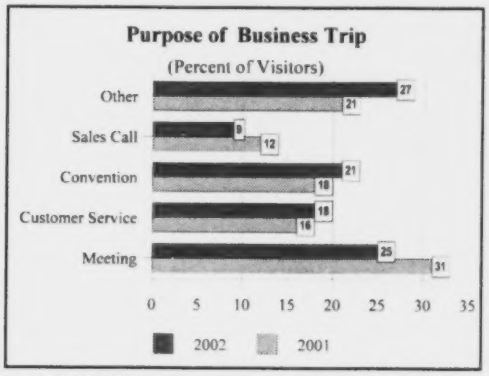


Exhibit 5

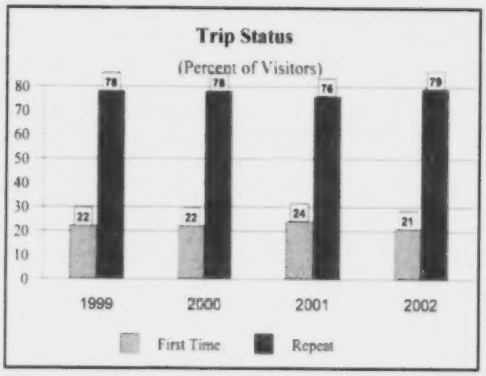


Exhibit 6

In 2002, single travellers accounted for 55% of business visitors to Prince Edward Island, while adult couples accounted for 22% and groups of friends accounted for 15% of business visitors. The remaining 8% of business travellers were accounted for by families with children less than 18 years old (Exhibit 7).

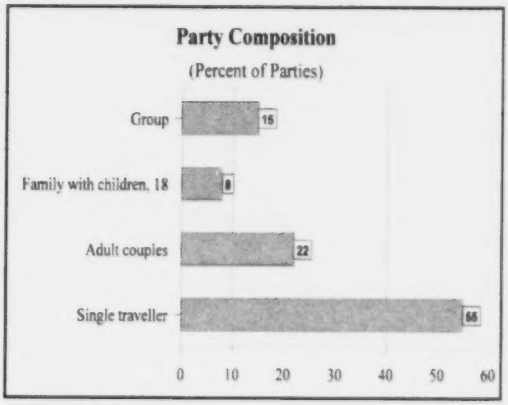


Exhibit 7

In 2002, a majority (68%) of business visitors were over 40 years of age, 82% worked full time and 83% had annual household incomes greater than $50,000. Business visitors spent an average of 4.3 nights in Prince Edward Island during their 2002 trip (Exhibit 8).

Business Visitors Demographics

(Percent of Visitors)

Age	**1999**	**2000**	**2001**	**2002**
<40 years	38%	30%	28%	32%
40+ years	62%	70%	72%	68%
Work Status				
Full Time	73%	82%	84%	82%
Retired	6%	8%	2%	3%
Other	21%	10%	14%	15%
Household Income				
<$50,000	35%	32%	18%	17%
$50,000+	65%	68%	82%	83%
Average Length of Stay	5.3	4.3	3.3	4.3

Exhibit 8

The main overnight destination for business visitors in 2002 was Charlottetown (53%) (Exhibit 9), while the main type of accommodation frequented by business visitors was Hotel/Motel (77%) (Exhibit 10).

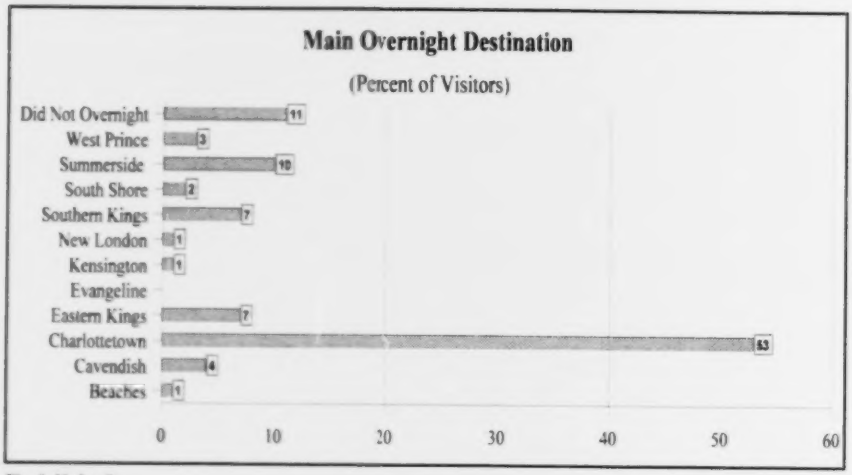


Exhibit 9

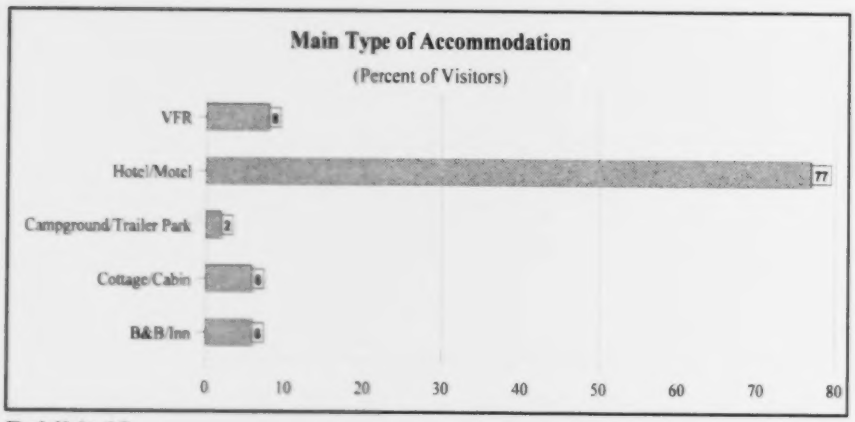


Exhibit 10

The top five activities enjoyed by business visitors during their 2002 stay in Prince Edward Island included: general merchandise shopping (44%), sightseeing (42%), craft/souvenir shopping (40%), beach visits (38%) and lobster suppers (37%).

Section 3. Motorcoach Visitor Profile

A 2002 survey of fixed-roof accommodations that hosted motorcoach visitors, supported by data collected by the 2002 Motorcoach Visitor Survey concluded that in 2002, 3% of all pleasure visitors to Prince Edward Island (an estimated 35,948 visitors) were motorcoach visitors. This represents a 3.3% increase from 34,808 passengers in 2001 (Exhibit 1). These visitors stayed an average of 2 nights in Prince Edward Island, occupying an estimated 26,418 room nights.

In 2002, the actual number of motorcoaches that visited Prince Edward Island increased by 10% from 872 to an estimated 958 coaches.

Although there was an increase of 3.3% in motorcoach visitors in 2002 and an increase in the average party size from 2.1 in 2001 to 2.2 in 2002, the number of motorcoach parties declined 1.4% from 16,575 in 2001 to 16,340 in 2002 (Exhibit 2).

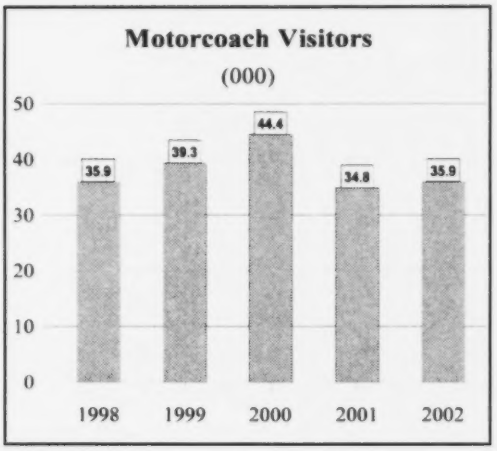


Exhibit 1

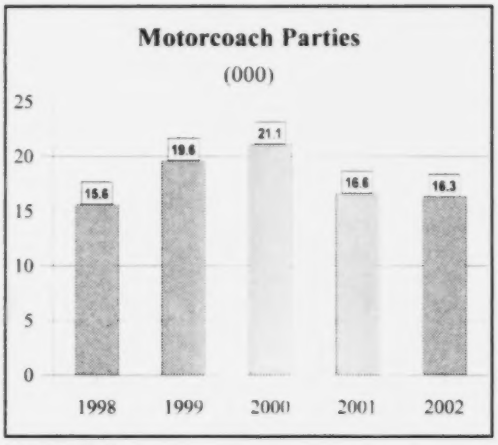


Exhibit 2

Expenditures per motorcoach visitor party decreased 13% from approximately $1,276 in 2001 to $1,112 in 2002. Given the decrease in party expenditures and in the number of motorcoach parties, overall motorcoach visitor receipts decreased by 13% to $18.2 million as compared to $21.2 million in 2001 (Exhibit 3).

As indicated in Exhibit 4, survey results suggest that American origins continued to account for the lion's share of motorcoach visitations. In 2002, 82% of all motorcoach visitors that were surveyed were Americans, with the significant majority being from Other USA (61%), New England (11%) and Mid-Atlantic (10%) states. The balance of motorcoach visitors were from Other Canada (7%), Ontario (7%) and International (3%).

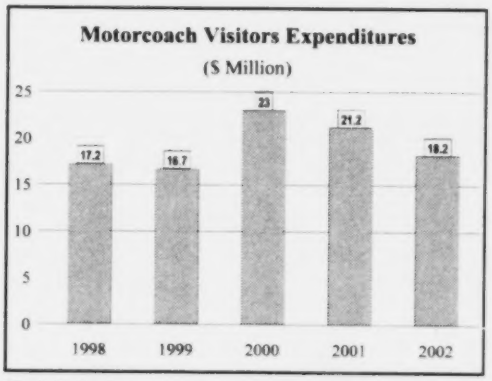


Exhibit 3

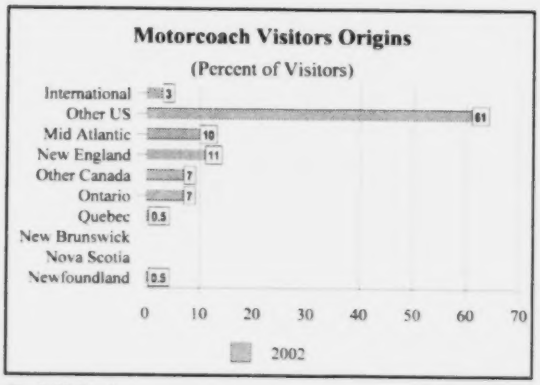


Exhibit 4

As shown in Exhibit 5, the main trip motives expressed by motorcoach visitors included; sightseeing (77%), history/culture (63%), Anne/Lucy Maud attractions (39%) and observe nature (24%). A large majority (91%) of motorcoach visitors were first time visitors to Prince Edward Island (Exhibit 6).

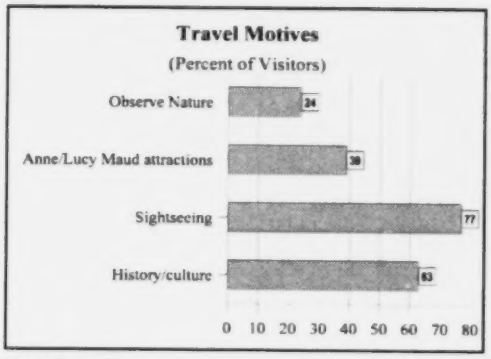


Exhibit 5

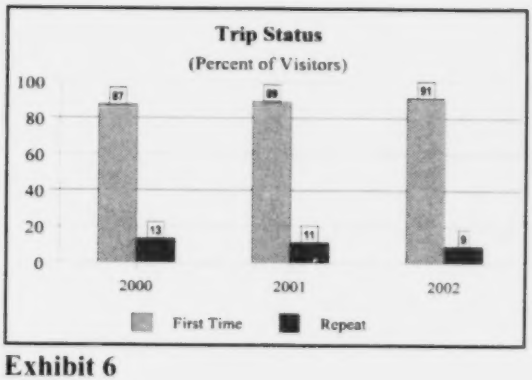


Exhibit 6

In 2002, 99% of all motorcoach visitor parties to Prince Edward Island were comprised of adults. As outlined in Exhibit 7, 85% were a group of adults or couples traveling alone or with other couples, 14% were single travelers, and 1% were family with children less than 18 years of age. Motorcoach visitors tended to be seniors 60 years of age and older (76%), retired (68%) and had annual household incomes that were less than $50,000 (53%). Motorcoach visitors spent an average of 1.9 nights in Prince Edward Island during their 2002 trip.

Motorcoach Visitors Demographics

(Percent of Visitors)

Age	2000	2001	2002
<60 years	13%	17%	24%
60+ years	87%	83%	76%
Work Status			
Full Time	8%	16%	17%
Retired	85%	78%	68%
Other	7%	6%	15%
Party Composition			
Singles	16%	8%	14%
Adults/Couples	81%	91%	85%
Family with Children < 18	3%	1%	1%
Household Income			
<$50,000	44%	54%	53%
$50,000+	56%	46%	47%
Average Length of Stay	2.0	2.0	1.9

Exhibit 7

Motorcoach survey results suggest that the most popular tourism products included in Prince Edward Island motorcoach itineraries were visits to Anne of Green Gables house in Cavendish (91%), lobster suppers (70%), PEI Preserve Company (54%), live theatre (52%), tours of Charlottetown/Province House/Founders Hall (47%), other Anne Of Green Gables attractions (46%), beaches (38%), Gateway Village (17%), and Woodleigh Replicas (15%).

Section 4. Japanese Visitor Profile

Visitation by Japanese visitors showed an increase of 7.1% in 2002, and an increase of 3% in the number of Japanese parties from the previous year. Total non-tour expenditures (expenditures on P.E.I. only) by Japanese visitors showed an increase of 25% from $1.04 million in 2001 to $1.30 million in 2002. (Exhibits1-3). The total tour expenditures are estimated at $3.3 million[4]. Total expenditures by Japanese visitors (non-tour and tour expenditures) is estimated at $4.6 million.

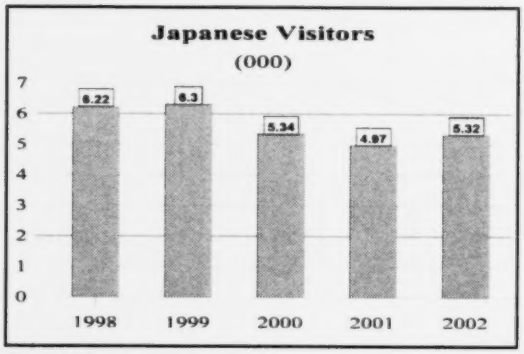


Exhibit 1

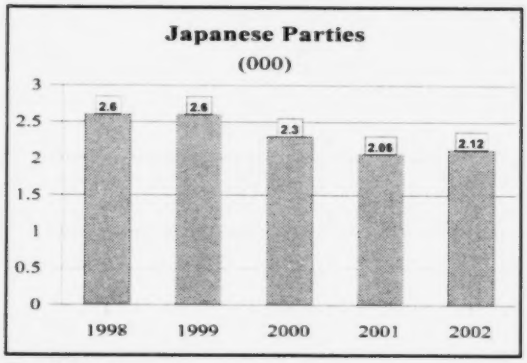


Exhibit 2

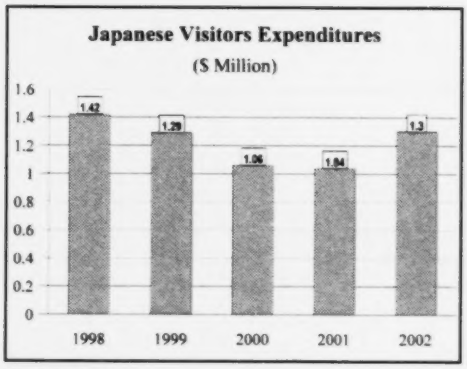


Exhibit 3

[4] PEI's share of tour costs do not include air travel costs and are calculated using PEI's share of trip nights (41%, Exhibit 5) and an average of a tour cost from Japan to the Atlantic Provinces. The average tour cost per person is $1,500 (quoted by JTB International Tours). PEI's share of tour costs is estimated at $615 per person.

In 2002, Japanese visitor party composition consisted of 46% adult couples, 31% group of friends, 19% families, and 4% single travellers.

Although Japanese average trip nights have decreased 9% from 7.5 nights in 2001 to 6.8 nights in 2002 (Exhibit 4), Prince Edward Island's share of Japanese visitors trip nights have increased slightly from 39% in 2001 to 41% in 2002 (Exhibit 5).

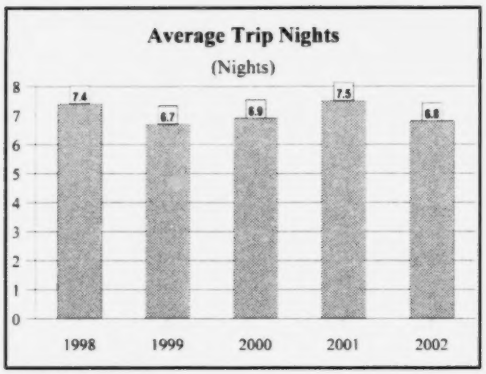


Exhibit 4

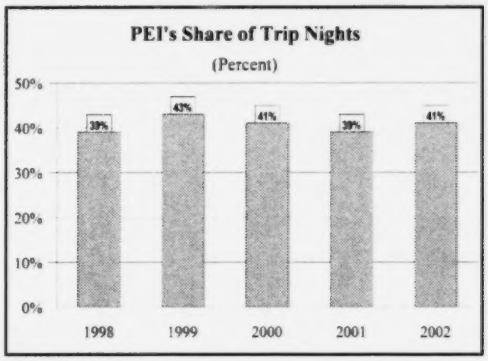


Exhibit 5

Part 5. Prince Edward Island's Tourism Markets

Section 1. Newfoundland

Section 2. Nova Scotia

Section 3. New Brunswick

Section 4. Quebec

Section 5. Ontario

Section 6. Other Canada

Section 7. New England

Section 8. Mid-Atlantic

Section 9. Other US

Section 10. International

Section 1. Newfoundland

Prince Edward Island experienced a decline of 6.9% in the number of pleasure parties from Newfoundland, and a decline of 8.6% in the number of pleasure visitors over last year. Total expenditures by pleasure visitors from Newfoundland showed a decline of 14.4% from $10.6 million in 2001 to $9.1 million in 2002 (Exhibits 1 - 3).

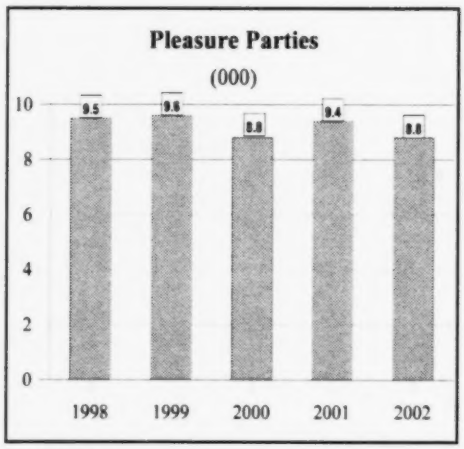


Exhibit 1

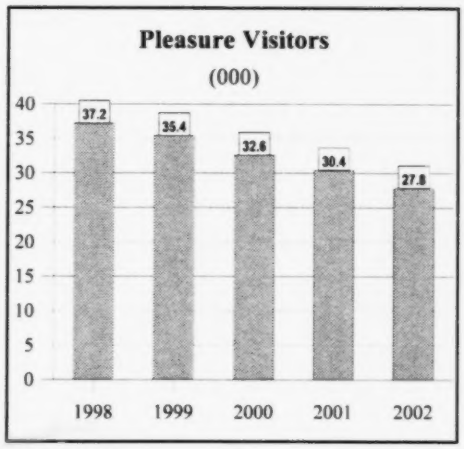


Exhibit 2

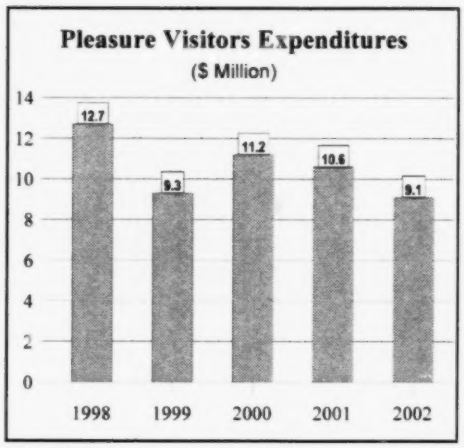


Exhibit 3

The main travel motives expressed by pleasure visitors from Newfoundland included; just to see PEI (36%), visiting friends and relatives (19%) and rest and relaxation (14%) (Exhibit 4). A majority (75%) of pleasure visitors from Newfoundland were repeat visitors to Prince Edward Island (Exhibit 5).

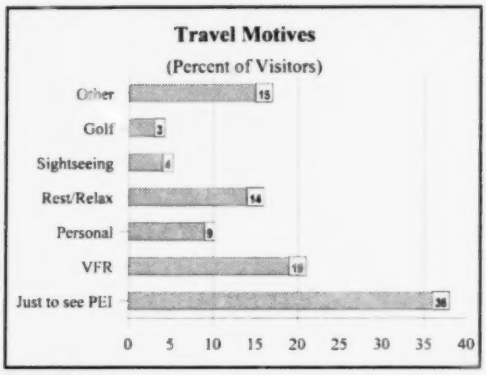


Exhibit 4

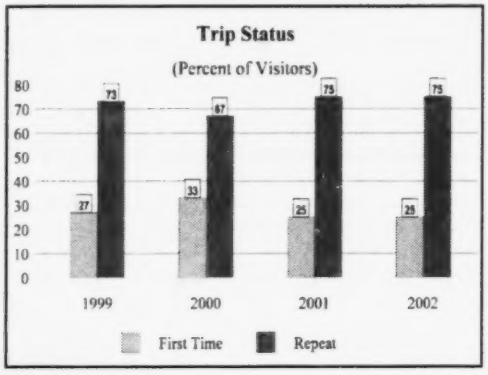


Exhibit 5

The majority (72%) of Newfoundland pleasure visitors made their decision to come to PEI more than four weeks prior to their departure. The remaining (28%) of Newfoundland pleasure visitors made their decision to come to PEI four weeks or less before their departure (Exhibit 6).

In 2002, Newfoundland pleasure visitor party composition consisted of 49% adult couples, 37% family with children less than 18 years old, 11% groups and 3% single travellers (Exhibit 7).

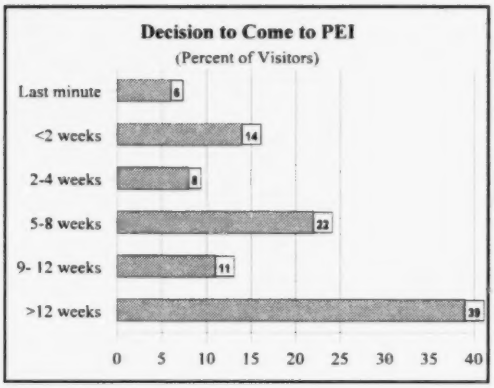


Exhibit 6

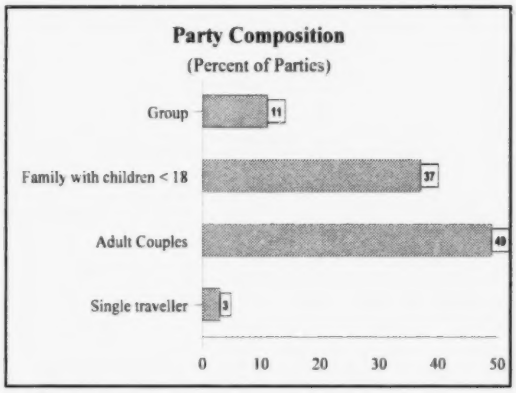


Exhibit 7

In 2002, the majority (73%) of pleasure visitors from Newfoundland were over 40 years of age, with 59% working full time. Almost two-thirds (62%) had annual household incomes greater than $50,000. Newfoundland pleasure visitors spent an average of 5 nights in Prince Edward Island during their 2002 vacation (Exhibit 8).

Newfoundland Pleasure Visitors Demographics
(Percent of Visitors)

Age	**2000**	**2001**	**2002**
<40 years	46%	27%	27%
40-59 years	42%	56%	52%
60+ years	13%	17%	21%
Work Status			
Full Time	59%	59%	59%
Retired	20%	22%	21%
Other	21%	19%	20%
Household Income			
<$35,000	26%	12%	21%
$35,000-$50,000	41%	19%	17%
>$50,000	34%	69%	62%
Average Length of Stay	4.6	5.8	5

Exhibit 8

The main overnight destinations for pleasure visitors from Newfoundland included: Cavendish (35%) and Charlottetown (29%) (Exhibit 9). The main types of accommodations frequented by Newfoundland pleasure visitors in 2002 included: Hotel/Motel (32%), Cottage/Cabin (26%), VFR (24%) Campground/Trailer Park (11%) and B&B/Country Inn (7%) (Exhibit 10).

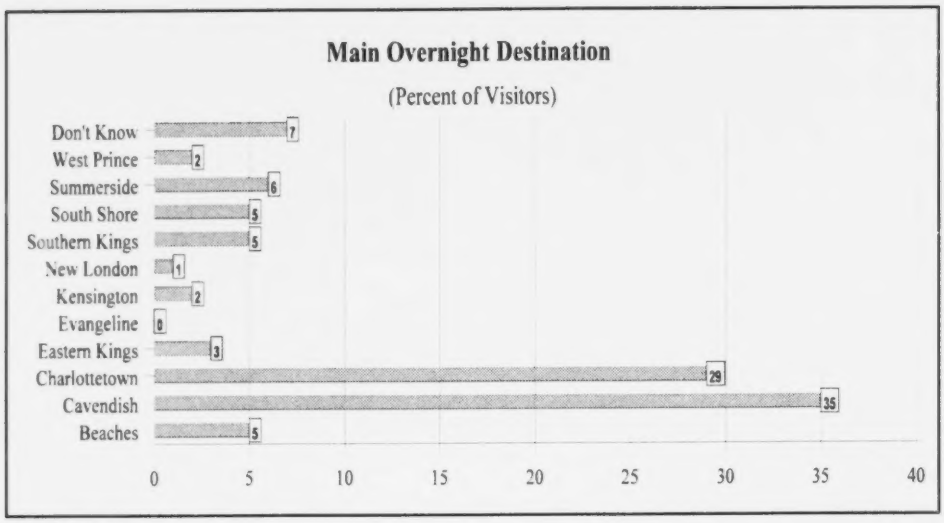


Exhibit 9

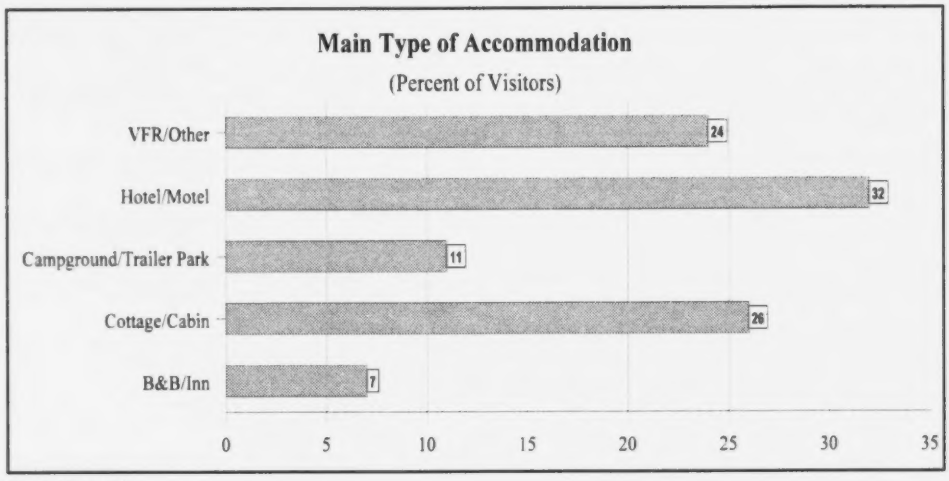


Exhibit 10

The top five activities enjoyed by Newfoundland pleasure visitors during their 2002 vacation in Prince Edward Island included: craft/souvenir shopping (80%), sightseeing (80%), shopping for general merchandise (67%), beach visits (67%) and driving tours (58%).

Section 2. Nova Scotia

Prince Edward Island experienced an increase of 4.4% in pleasure parties from Nova Scotia, however there was a decline of 9.8% in the number of pleasure visitors over last year. Total expenditures by pleasure visitors from Nova Scotia showed an increase of 10.6% from $41.6 million in 2001 to $46 million in 2002 (Exhibits 1 - 3).

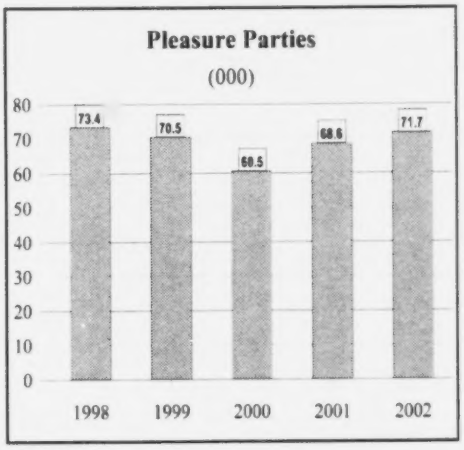


Exhibit 1

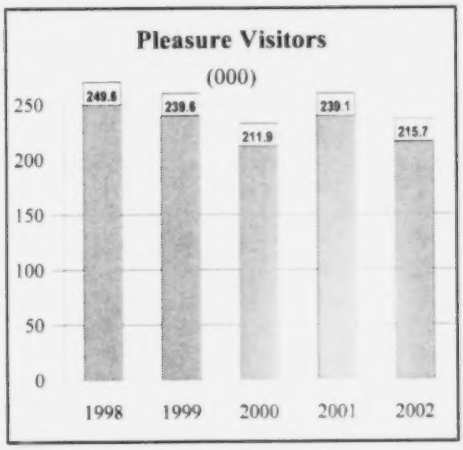


Exhibit 2

Exhibit 3

The main travel motives expressed by pleasure visitors from Nova Scotia included; visiting friends and relatives (26%), just to see PEI (24%), and rest and relaxation (15%) (Exhibit 4). The majority (94%) of pleasure visitors from Nova Scotia were repeat visitors to Prince Edward Island (Exhibit 5).

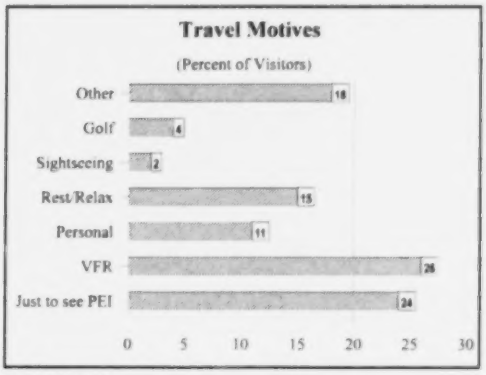


Exhibit 4

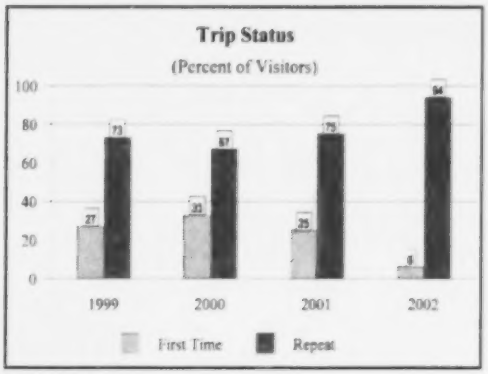
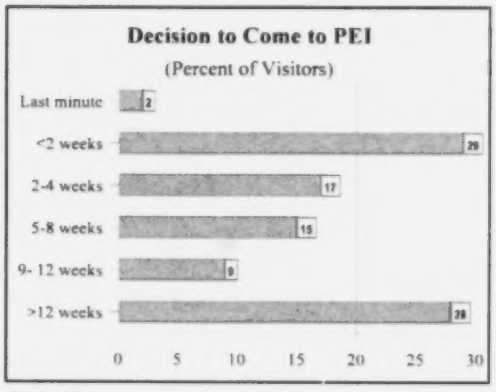


Exhibit 5

Fifty-two percent of Nova Scotia pleasure visitors made their decision to come to PEI more than four weeks prior to their departure. The remainder (48%) of Nova Scotia pleasure visitors made their decision to come to PEI four weeks or less before their departure (Exhibit 6).

In 2002, Nova Scotia pleasure visitor party composition consisted of 48% adult couples, 32% family with children less than 18 years old, 13% groups and 7% single travellers (Exhibit 7).



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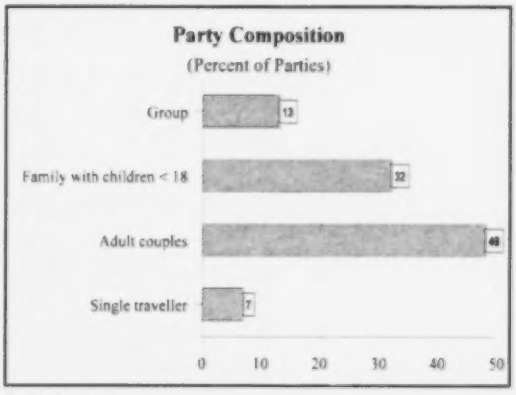


Exhibit 7

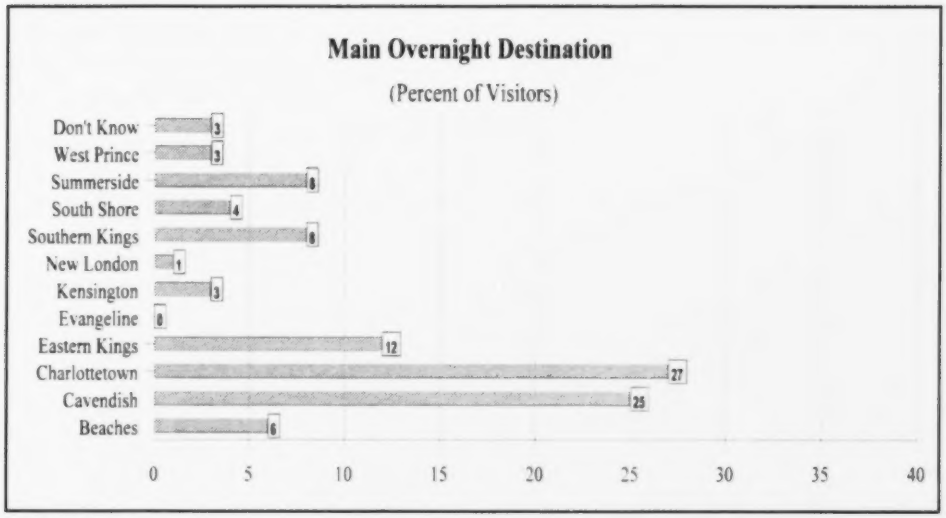
In 2002, the majority (69%) of pleasure visitors from Nova Scotia were over 40 years of age, with 58% working full time. Almost two-thirds (63%) had annual household incomes greater than $50,000. Nova Scotia pleasure visitors spent an average of 4 nights in Prince Edward Island during their 2002 vacation (Exhibit 8).

Nova Scotia Pleasure Visitors Demographics
(Percent of Visitors)

Age	2000	2001	2002
<40 years	32%	29%	31%
40-59 years	50%	50%	48%
60+ years	18%	21%	21%
Work Status			
Full Time	59%	58%	58%
Retired	22%	25%	25%
Other	19%	17%	17%
Household Income			
<$35,000	22%	21%	16%
$35,000-$50,000	17%	24%	21%
>$50,000	61%	55%	63%
Average Length of Stay	3.4	4.0	4.0

Exhibit 8

The main overnight destinations for pleasure visitors from Nova Scotia included: Charlottetown (27%) and Cavendish (25%), (Exhibit 9). The main types of accommodations frequented by Nova Scotia pleasure visitors in 2002 included: Cottage/Cabin (29%), VFR/Other (28%), Hotel/Motel (25%), Campground/Trailer Park (15%) and B&B/Country Inn (3%) (Exhibit 10).



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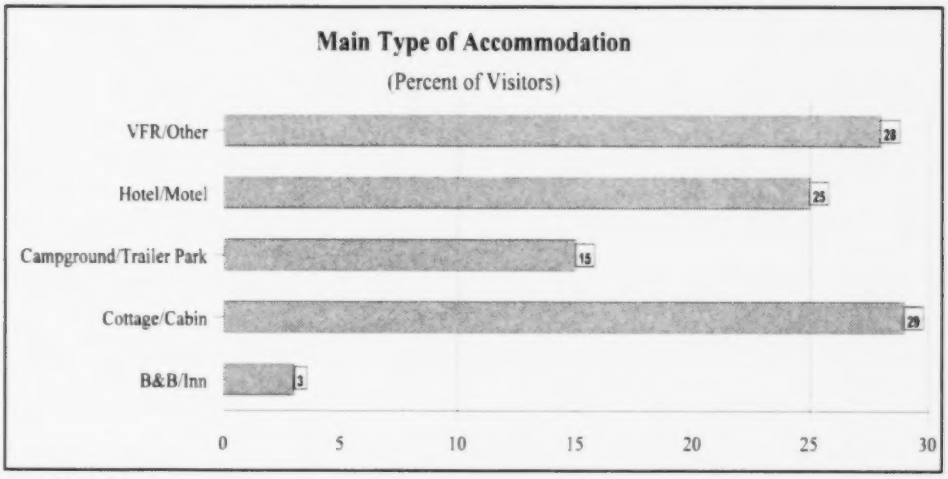


Exhibit 10

The top five activities enjoyed by Nova Scotia pleasure visitors during their 2002 vacation in Prince Edward Island included: sightseeing (67%), shopping for general merchandise (59%), beach visits (57%), craft/souvenir shopping (53%), and driving tours (43%).

Section 3. New Brunswick

Prince Edward Island experienced a decline of 3.3% in the number of pleasure parties from New Brunswick, and a decline of 6.9% in the number of pleasure visitors over last year. Total expenditures by pleasure visitors from New Brunswick showed an increase of 9.1% from $19.7 million in 2001 to $21.5 million in 2002 (Exhibits 1 - 3).

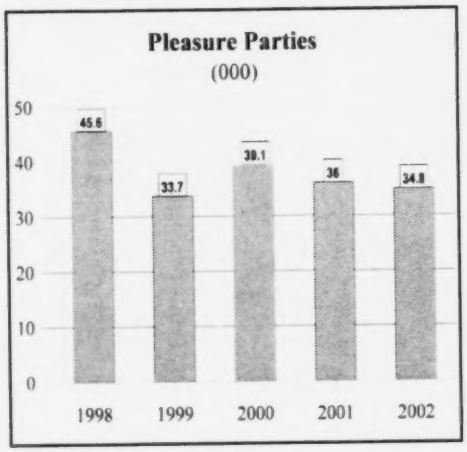
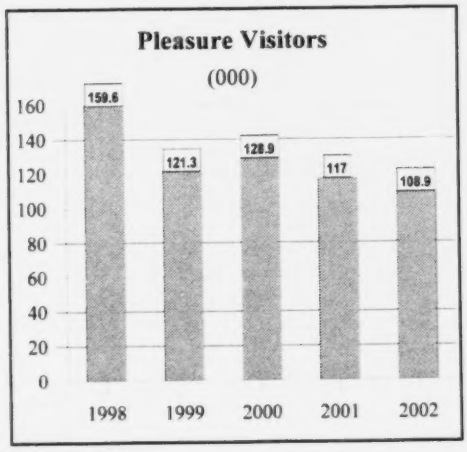


Exhibit 1



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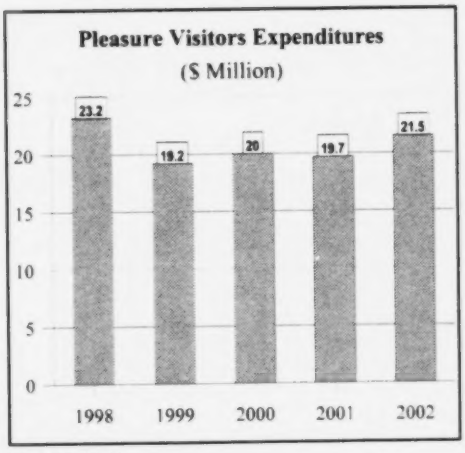
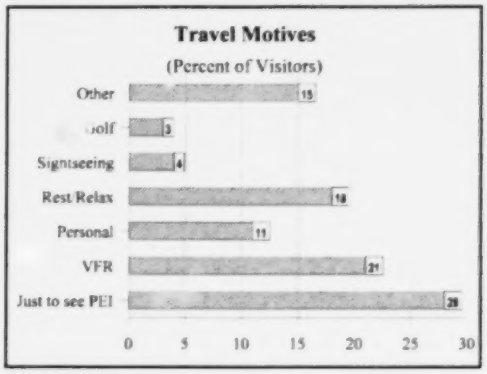


Exhibit 3

The main travel motives expressed by pleasure visitors from New Brunswick included: just to see PEI (28%), visiting friends and relatives (21%), and rest and relaxation (18%) (Exhibit 4). The majority (95%) of pleasure visitors from New Brunswick were repeat visitors to Prince Edward Island (Exhibit 5).



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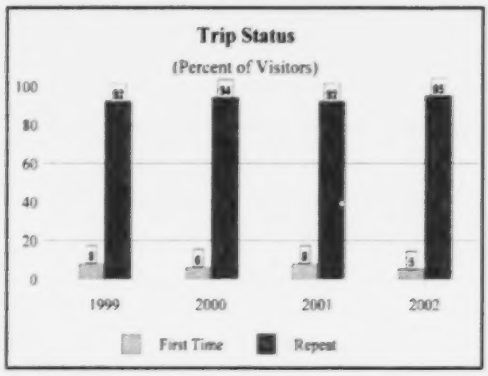


Exhibit 5

One half (50%) of New Brunswick pleasure visitors made their decision to come to PEI more than four weeks prior to their departure. The remaining (50%) of New Brunswick pleasure visitors made their decision to come to PEI four weeks or less before their departure (Exhibit 6).

In 2002, New Brunswick pleasure visitor party composition consisted of 46% adult couples, 38% family with children less than 18 years old, 9% groups and 7% single travellers (Exhibit 7).

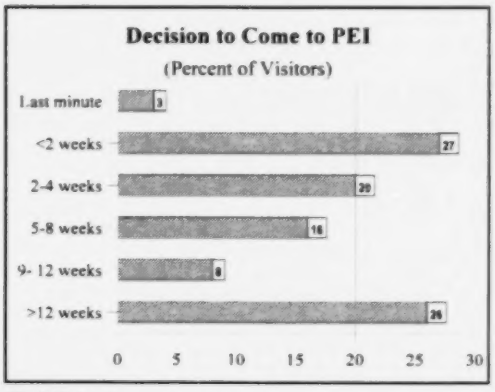


Exhibit 6

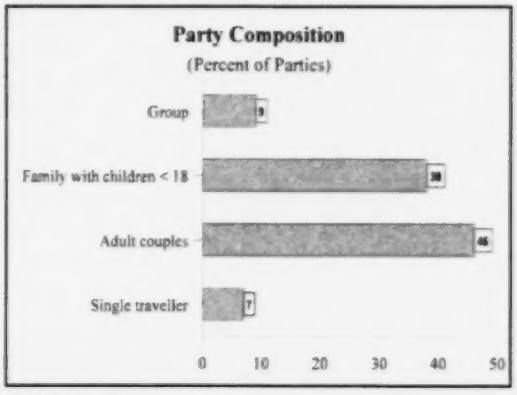


Exhibit 7

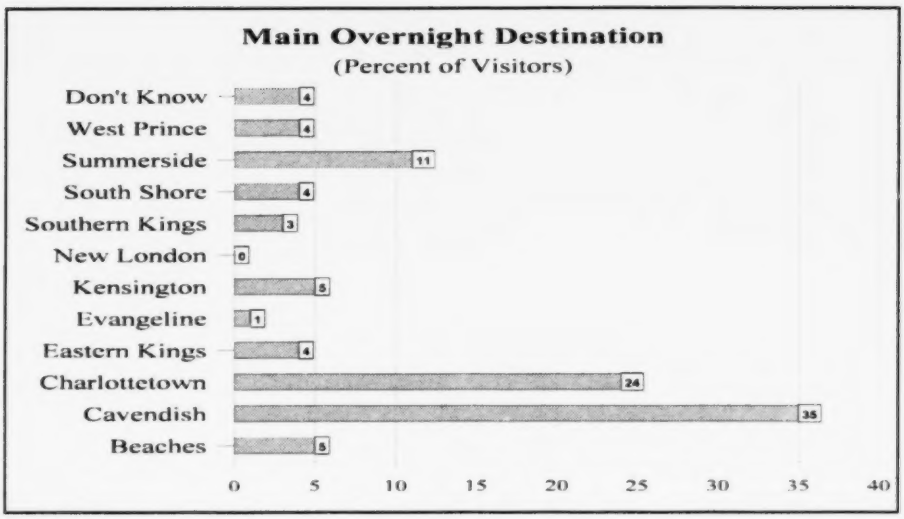
In 2002, two thirds (66%) of pleasure visitors from New Brunswick were over 40 years of age, with 59% working full time. Fifty-seven percent had annual household incomes greater than $50,000. New Brunswick pleasure visitors spent an average of 3.6 nights in Prince Edward Island during their 2002 vacation (Exhibit 8).

New Brunswick Pleasure Visitors Demographics
(Percent of Visitors)

Age	**2000**	**2001**	**2002**
<40 years	36%	37%	34%
40-59 years	46%	45%	52%
60+ years	18%	18%	14%
Work Status			
Full Time	61%	64%	59%
Retired	20%	21%	18%
Other	19%	15%	23%
Household Income			
<$35,000	26%	25%	18%
$35,000-$50,000	24%	24%	25%
>$50,000	50%	51%	57%
Average Length of Stay	2.8	3.0	3.6

Exhibit 8

The main overnight destinations for pleasure visitors from New Brunswick included: Cavendish (35%) and Charlottetown (24%) (Exhibit 9). The main types of accommodations frequented by New Brunswick pleasure visitors in 2002 included: Cottage/Cabin (26%), Hotel/Motel (25%), Campground/Trailer Park (23%), VFR/Other (22%) and B&B/Country Inn (4%) (Exhibit 10).



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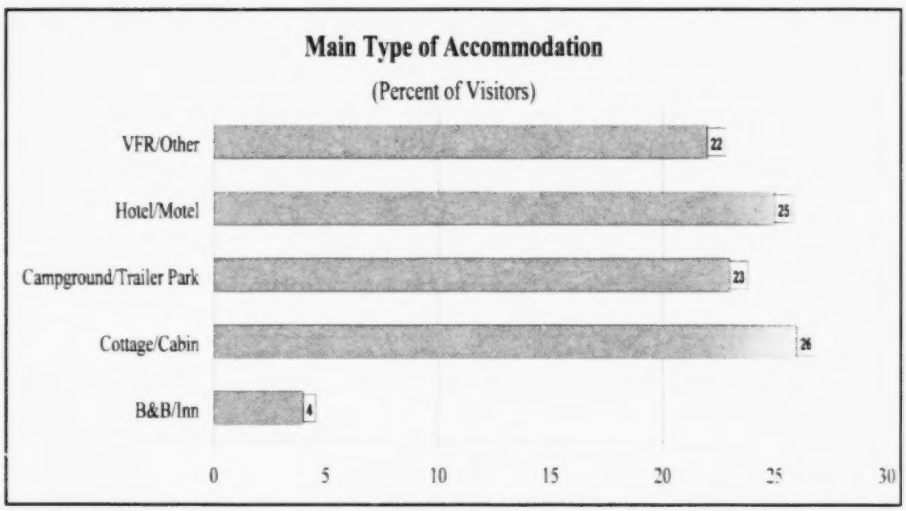
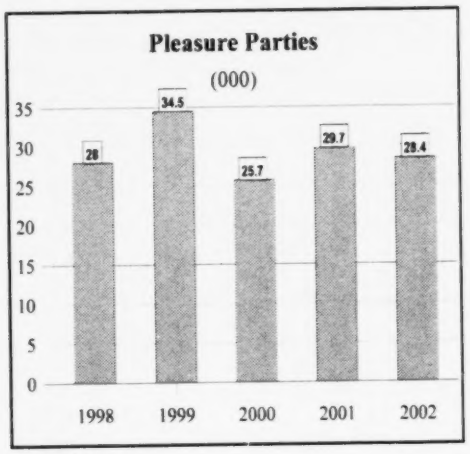


Exhibit 10

The top five activities enjoyed by Nova Scotia pleasure visitors during their 2002 vacation in Prince Edward Island included: sightseeing (67%), shopping for general merchandise (59%), beach visits (57%), craft/souvenir shopping (53%), and driving tours (43%).

Section 4. Quebec

Prince Edward Island experienced a decline of 4.6% in the number of pleasure parties from Quebec, and a decline of 9.3% in the number of pleasure visitors over last year. Total expenditures by pleasure visitors from Quebec showed an increase of 16.7% from $22.8 million in 2001 to $26.6 million in 2002 (Exhibits 1 - 3).



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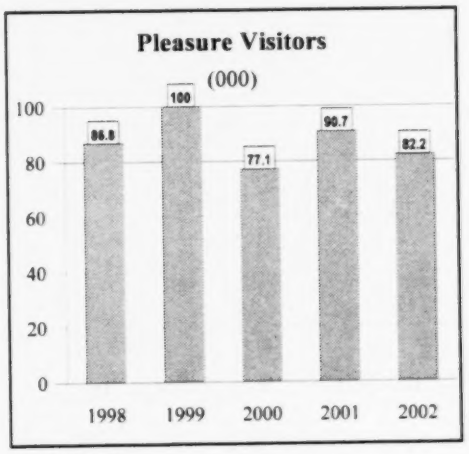

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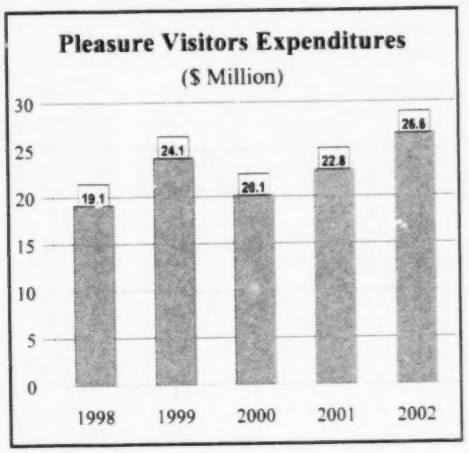
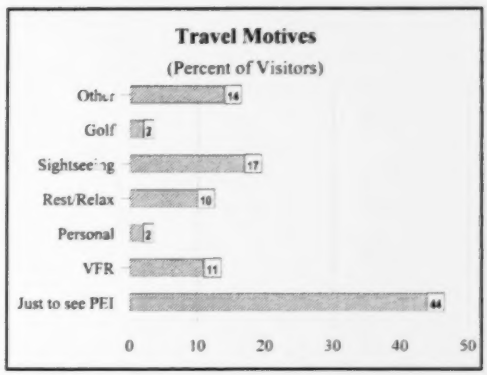


Exhibit 3

The main travel motives expressed by pleasure visitors from Quebec included; just to see PEI (44%), sightseeing (17%), and visiting friends and relatives (11%)(Exhibit 4). One half (50%) of pleasure visitors from Quebec were first time visitors to Prince Edward Island (Exhibit 5).



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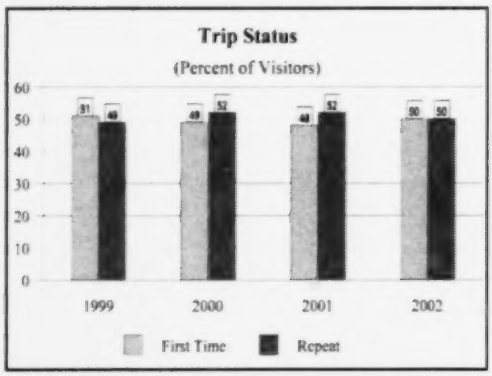
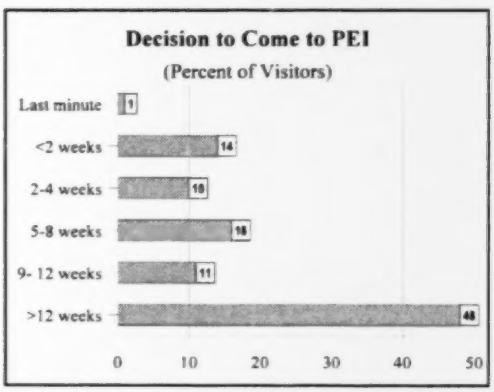


Exhibit 5

A majority (75%) of Quebec pleasure visitors made their decision to come to PEI more than four weeks prior to their departure. The remaining (25%) of Quebec pleasure visitors made their decision to come to PEI four weeks or less before their departure (Exhibit 6).

In 2002, Quebec pleasure visitor party composition consisted of 58% adult couples, 28% family with children less than 18 years old, 10% groups and 4% single travellers (Exhibit 7).



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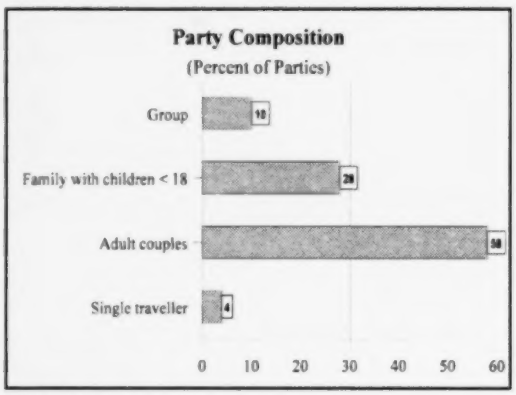


Exhibit 7

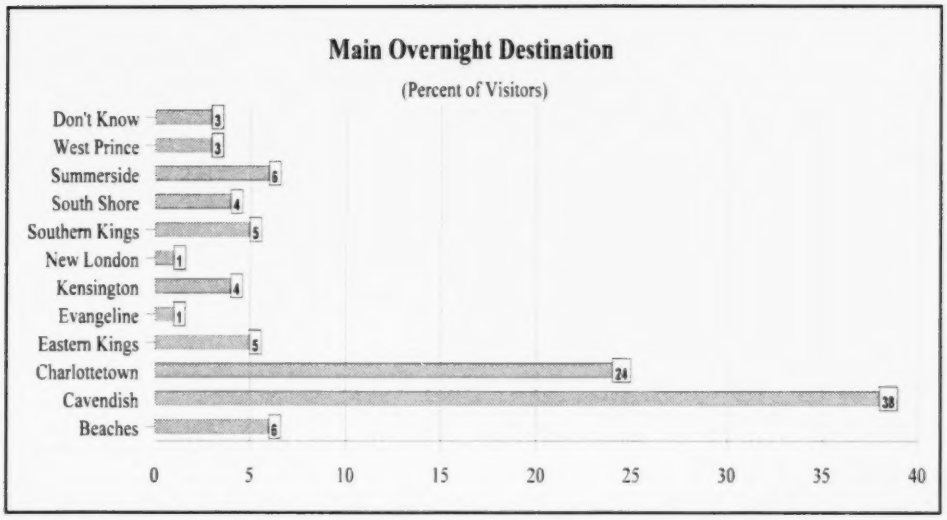
In 2002, the majority (76%) of pleasure visitors from Quebec were over 40 years of age, with 58% working full time. Sixty-three percent had annual household incomes greater than $50,000. Quebec pleasure visitors spent an average of 5.1 nights in Prince Edward Island during their 2002 vacation (Exhibit 8).

Quebec Pleasure Visitors Demographics
(Percent of Visitors)

Age	**2000**	**2001**	**2002**
<40 years	28%	27%	24%
40-59 years	52%	52%	53%
60+ years	20%	21%	23%
Work Status			
Full Time	59%	62%	58%
Retired	21%	24%	26%
Other	20%	14%	16%
Household Income			
<$35,000	17%	15%	18%
$35,000-$50,000	24%	22%	19%
>$50,000	59%	63%	63%
Average Length of Stay	4.4	5.1	5.1

Exhibit 8

The main overnight destinations for pleasure visitors from Quebec included: Cavendish (38%) and Charlottetown (24%) (Exhibit 9). The main types of accommodations frequented by Quebec pleasure visitors in 2002 included: Hotel/Motel (32%) Campground/Trailer Park (30%), Cottage/Cabin (15%), VFR/Other (12%) and B&B/Country Inn (11%) (Exhibit 10).



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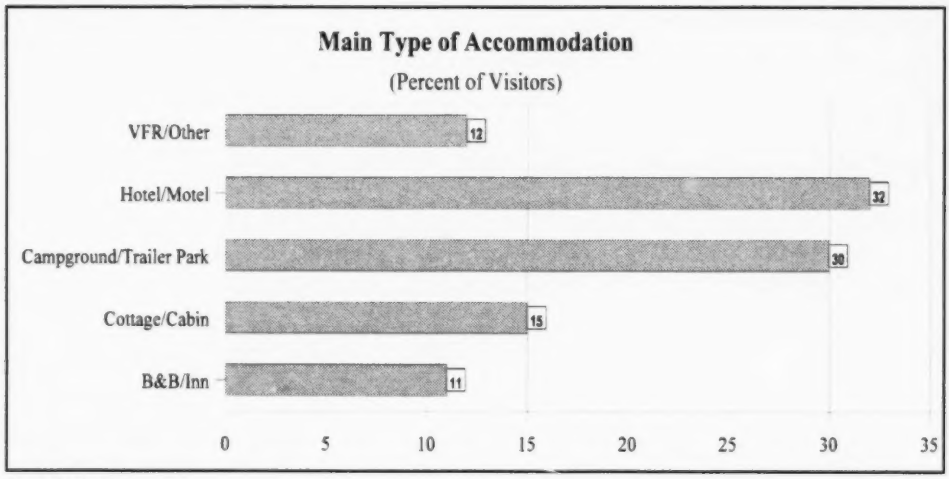
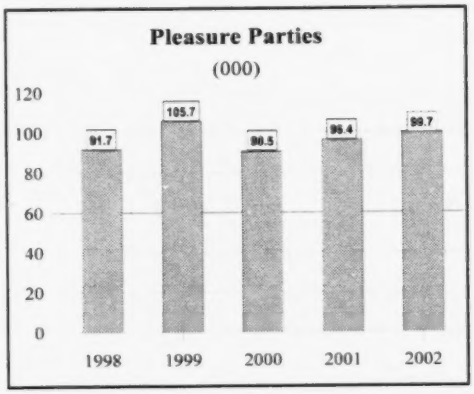


Exhibit 10

The top five activities enjoyed by Quebec pleasure visitors during their 2002 vacation in Prince Edward Island included: beach visits (78%), lobster suppers (77%), sightseeing (77%), driving tour (70%), and visiting National Park (64%).

Section 5. Ontario

Prince Edward Island experienced an increase of 3.5% in the number of pleasure parties from Ontario, and an increase of 2.2% in the number of pleasure visitors over last year. Total expenditures by pleasure visitors from Ontario showed an increase of 6.1% from $87.6 million in 2001 to $92.9 million in 2002 (Exhibits 1 - 3).



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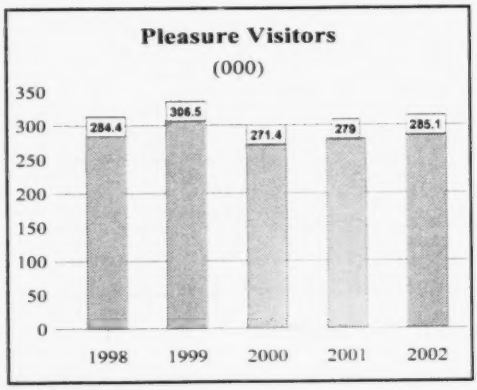

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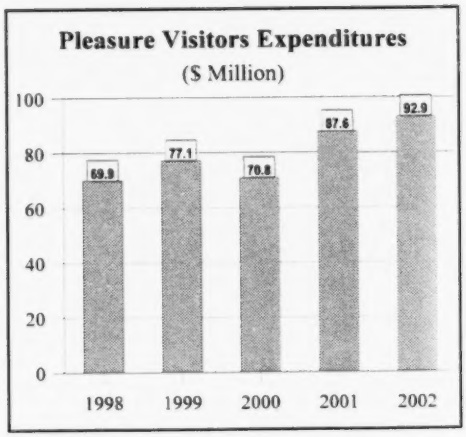
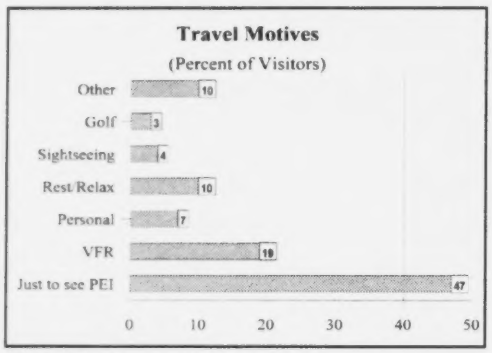


Exhibit 3

The main travel motives expressed by pleasure visitors from Ontario included; just to see PEI (47%), visiting friends and relatives (19%), and rest, relax and escape (10%) (Exhibit 4). Slightly over half (54%) of pleasure visitors from Ontario were repeat visitors to Prince Edward Island (Exhibit 5).



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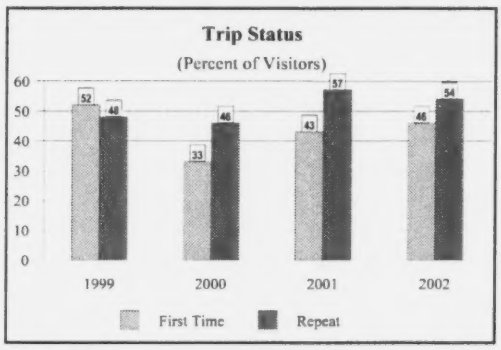
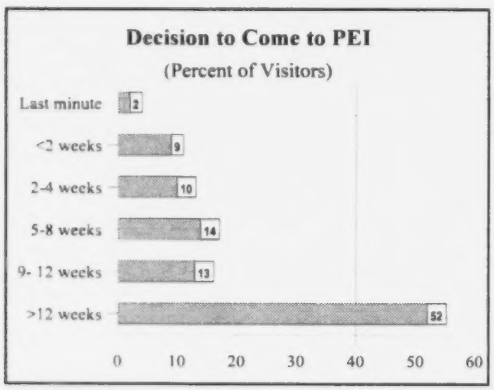


Exhibit 5

A majority (79%) of Ontario pleasure visitors made their decision to come to PEI more than four weeks prior to their departure. The remaining (21%) of Ontario pleasure visitors made their decision to come to PEI four weeks or less before their departure (Exhibit 6).

In 2002, Ontario pleasure visitor party composition consisted of 55% adult couples, 30% family with children less than 18 years old, 9% groups and 6% single travellers (Exhibit 7).



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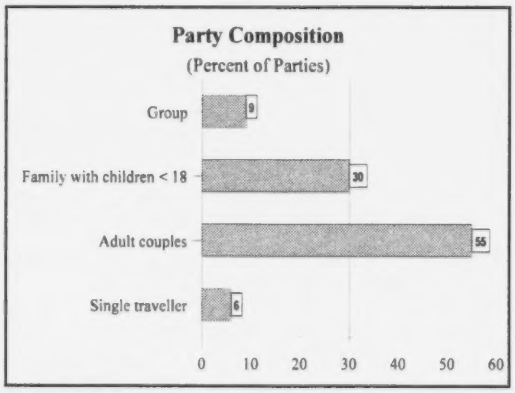


Exhibit 7

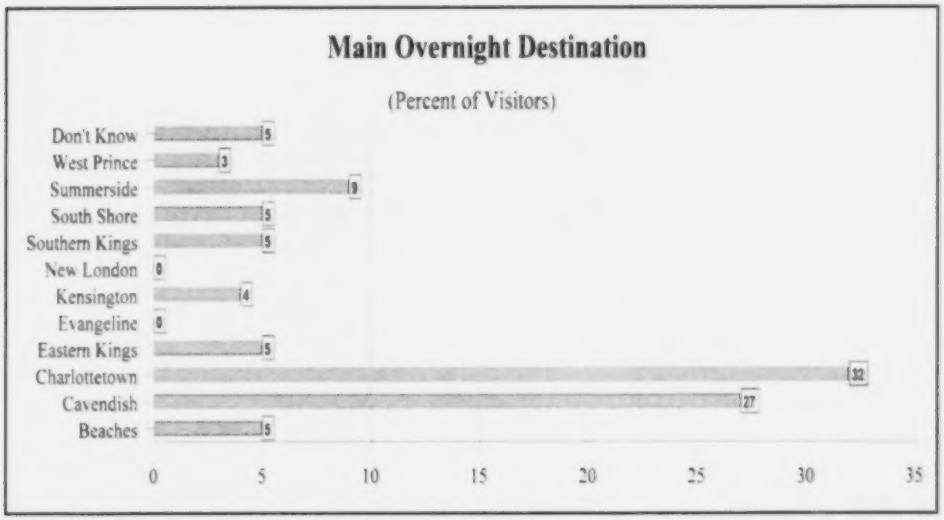
In 2002, the majority (77%) of pleasure visitors from Ontario were over 40 years of age, with 60% working full time. Seventy-six percent had annual household incomes greater than $50,000. Ontario pleasure visitors spent an average of 4.7 nights in Prince Edward Island during their 2002 vacation (Exhibit 8).

Ontario Pleasure Visitors Demographics
(Percent of Visitors)

Age	2000	2001	2002
<40 years	29%	27%	23%
40-59 years	50%	47%	52%
60+ years	21%	26%	25%
Work Status			
Full Time	61%	59%	60%
Retired	21%	27%	26%
Other	18%	14%	14%
Household Income			
<$35,000	11%	10%	8%
$35,000-$50,000	41%	15%	16%
>$50,000	48%	75%	76%
Average Length of Stay	4.4	5.5	4.7

Exhibit 8

The main overnight destinations for pleasure visitors from Ontario included: Charlottetown (32%), and Cavendish (27%) (Exhibit 9). The main types of accommodations frequented by Ontario pleasure visitors in 2002 included: Hotel/Motel (38%), Cottage/Cabin (18%), Campground/Trailer Park (17%), VFR/Other (15%) and B&B/Country Inn (12%) (Exhibit 10).



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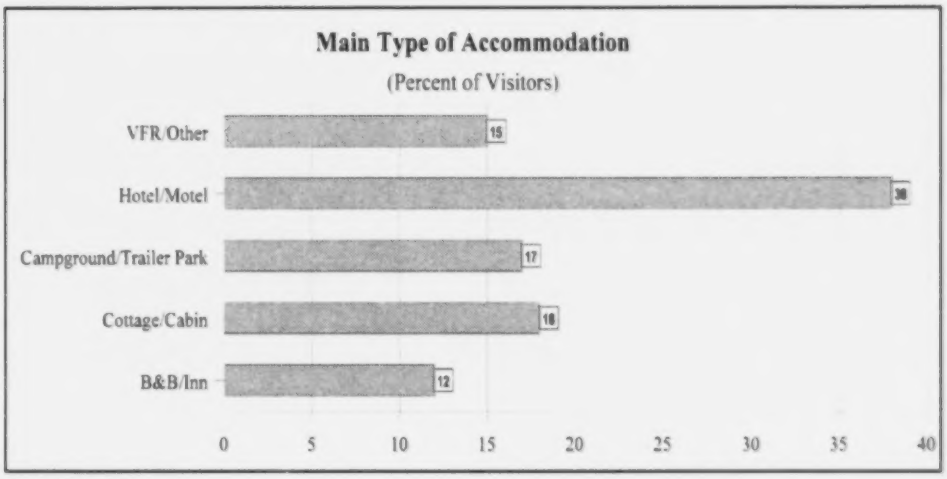
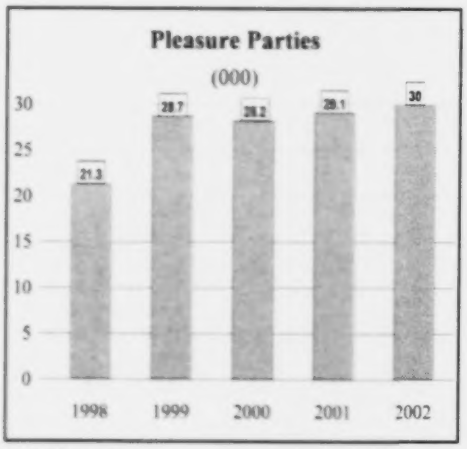


Exhibit 10

The top five activities enjoyed by Ontario pleasure visitors during their 2002 vacation in Prince Edward Island included: sightseeing (85%), beach visits (76%), craft/souvenir shopping (75%), visiting National Park (61%), and driving tours (56%).

Section 6. Other Canada

Prince Edward Island experienced an increase of 3.1% in the number of pleasure parties from Other Canada, and an increase of 2.6% in the number of pleasure visitors over last year. Total expenditures by pleasure visitors from Other Canada showed a decline of 1.3% from $28.4 million in 2001 to $28 million in 2002 (Exhibits 1 - 3).



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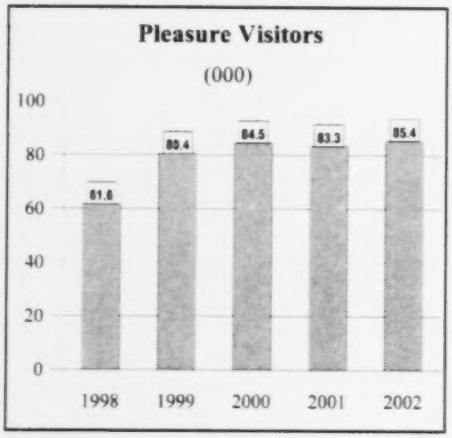
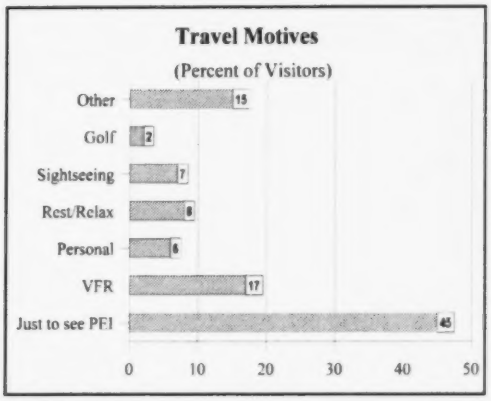


Exhibit 2

Exhibit 3

The main travel motives expressed by pleasure visitors from Other Canada included; just to see PEI (45%), visiting friends and relatives (17%), and rest, relax and escape (8%) (Exhibit 4). Less than two thirds (61%) of pleasure visitors from Other Canada were first time visitors to Prince Edward Island (Exhibit 5).



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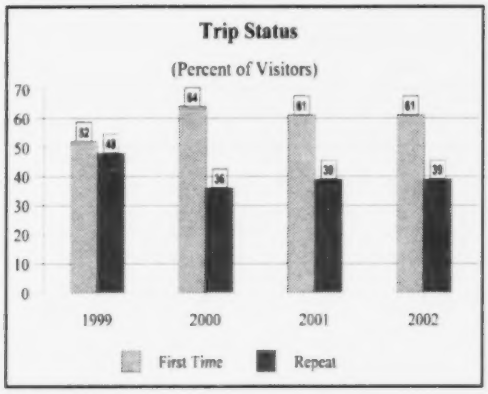


Exhibit 5

The majority (89%) of Other Canada pleasure visitors made their decision to come to PEI more than four weeks prior to their departure. The remaining (11%) of Other Canada pleasure visitors made their decision to come to PEI four weeks or less before their departure (Exhibit 6).

In 2002, Other Canada pleasure visitor party composition consisted of 56% adult couples, 25% family with children less than 18 years old, 11% groups and 8% single travellers (Exhibit 7).

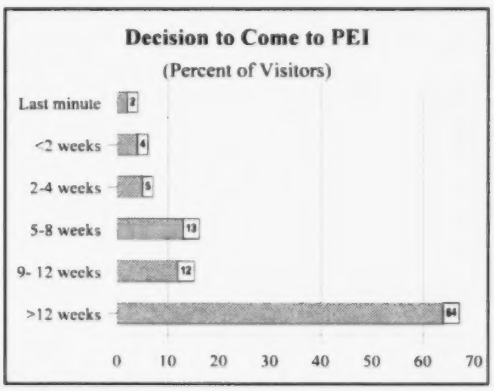


Exhibit 6

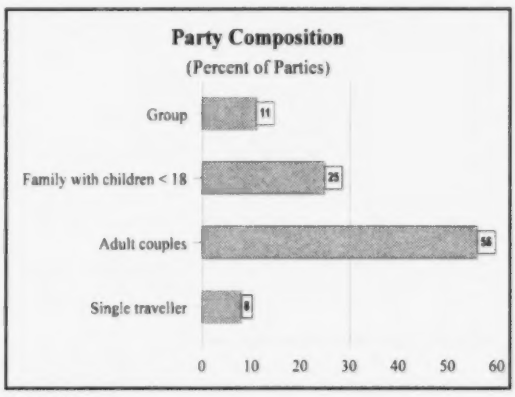


Exhibit 7

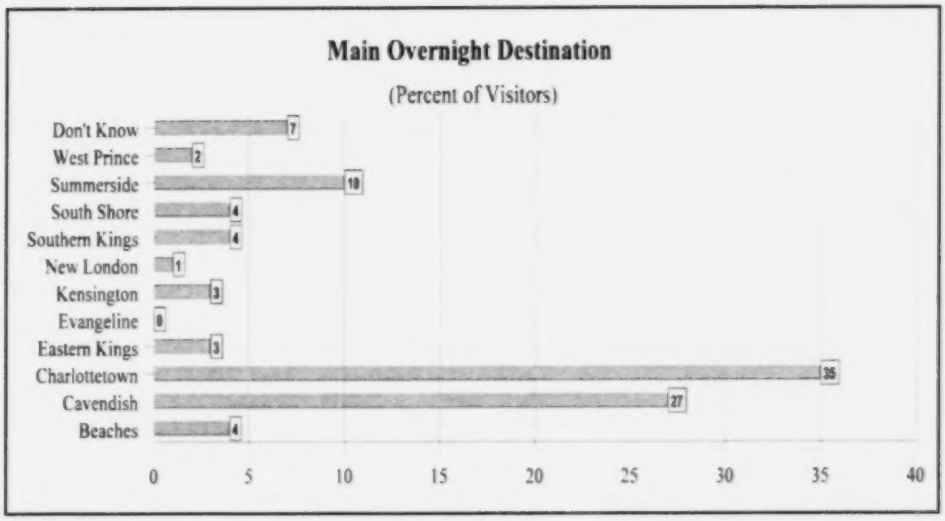
In 2002, the majority (82%) of pleasure visitors from Other Canada were over 40 years of age, with 53% working full time. Seventy-six percent had annual household incomes greater than $50,000. Other Canada pleasure visitors spent an average of 5.9 nights in Prince Edward Island during their 2002 vacation (Exhibit 8).

Other Canada Pleasure Visitors Demographics
(Percent of Visitors)

Age	2000	2001	2002
<40 years	28%	23%	18%
40-59 years	53%	56%	60%
60+ years	19%	21%	22%
Work Status			
Full Time	57%	66%	53%
Retired	15%	18%	23%
Other	26%	16%	24%
Household Income			
<$35,000	15%	9%	8%
$35,000-$50,000	40%	18%	16%
>$50,000	46%	73%	76%
Average Length of Stay	5.0	6.6	5.9

Exhibit 8

The main overnight destinations for pleasure visitors from Other Canada included: Charlottetown (35%) and Cavendish (27%)(Exhibit 9). The main types of accommodations frequented by Other Canada pleasure visitors in 2002 included: Hotel/Motel (35%), Cottage/Cabin (19%), B&B/Country Inn (17%), Campground/Trailer Park (12%) and VFR/Other (17%) (Exhibit 10).



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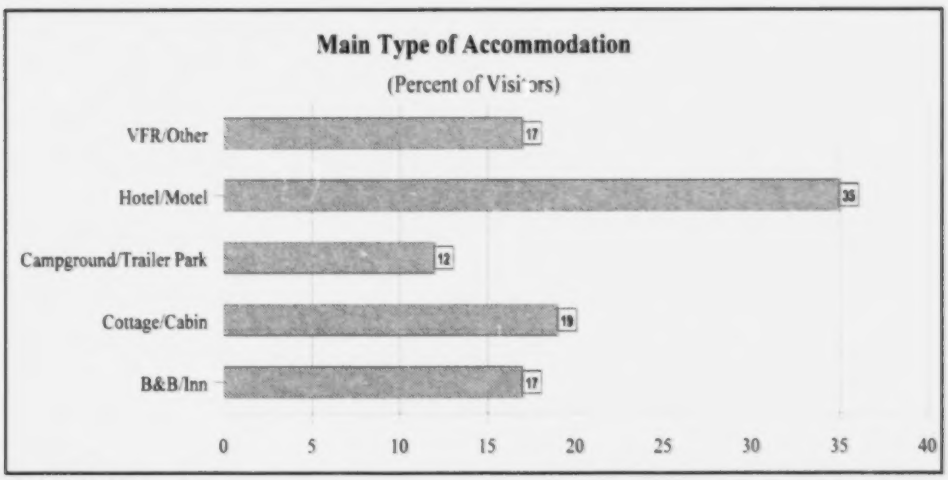


Exhibit 10

The top five activities enjoyed by Other Canada pleasure visitors during their 2002 vacation in Prince Edward Island included: sightseeing (90%), beach visits (79%), craft/souvenir shopping (79%), visiting National Park (69%), and visiting Anne of Green Gables (60%).

Section 7. New England

Prince Edward Island experienced an increase of 8.3% in the number of pleasure parties from New England, and an increase of 1.2% in the number of pleasure visitors over last year. Total expenditures by pleasure visitors from New England showed an increase of 22.5% from $26.3 million in 2001 to $32.2 million in 2002 (Exhibits 1 - 3).

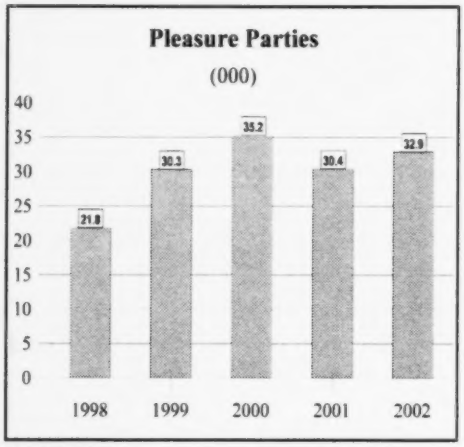
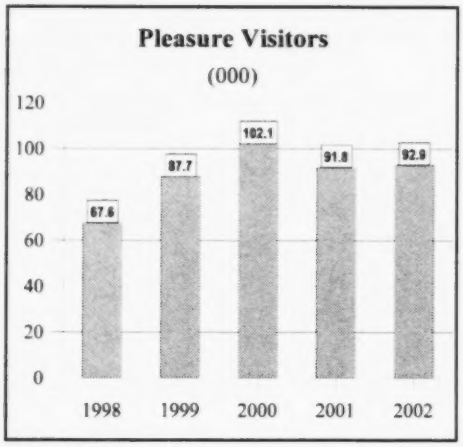


Exhibit 1



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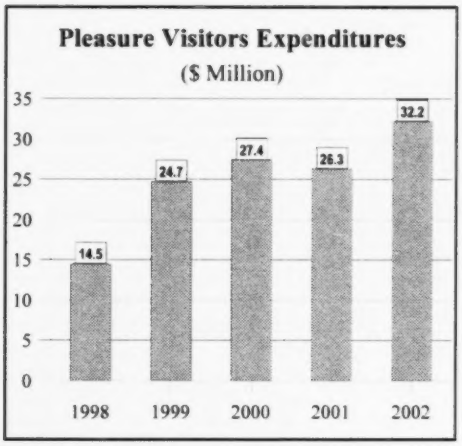
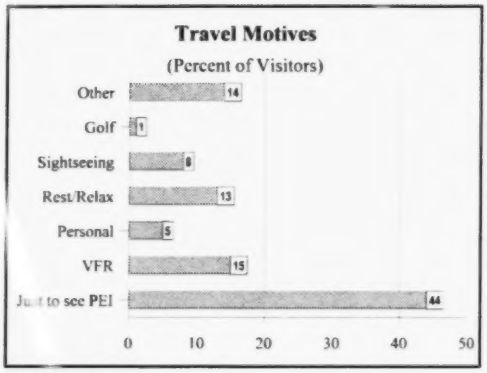


Exhibit 3

The main travel motives expressed by pleasure visitors from New England included: just to see PEI (44%), visiting friends and relatives (15%), and rest, relax and escape (13%)(Exhibit 4). Fifty-six percent of pleasure visitors from New England were first time visitors to Prince Edward Island (Exhibit 5).



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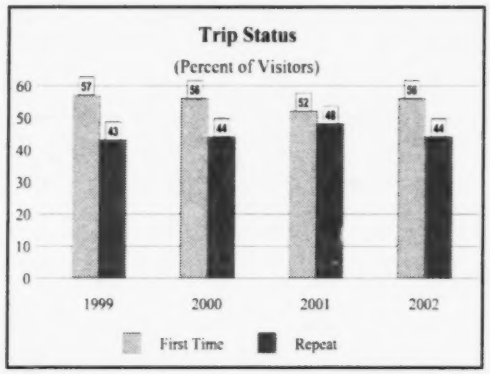
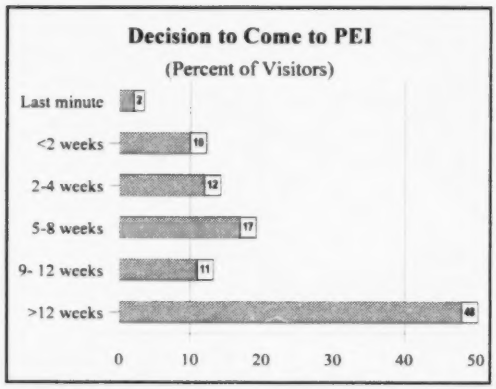


Exhibit 5

The majority (76%) of New England pleasure visitors made their decision to come to PEI more than four weeks prior to their departure. The remaining (24%) of New England pleasure visitors made their decision to come to PEI four weeks or less before their departure (Exhibit 6).

In 2002, New England pleasure visitor party composition consisted of 64% adult couples, 21% family with children less than 18 years old, 10% groups and 5% single travellers (Exhibit 7).



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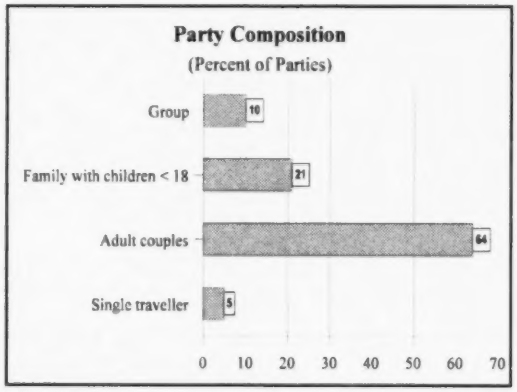


Exhibit 7

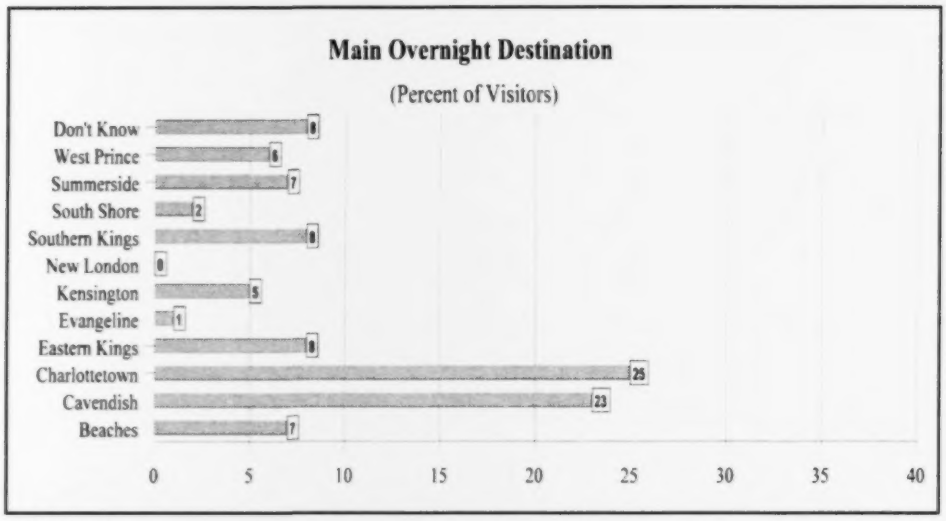
In 2002, the majority (84%) of pleasure visitors from New England were over 40 years of age, with 53% working full time. Sixty-seven percent had annual household incomes greater than $50,000. New England pleasure visitors spent an average of 5.1 nights in Prince Edward Island during their 2002 vacation (Exhibit 8).

New England Pleasure Visitors Demographics
(Percent of Visitors)

Age	**2000**	**2001**	**2002**
<40 years	17%	17%	16%
40-59 years	51%	48%	51%
60+ years	32%	35%	33%
Work Status			
Full Time	57%	53%	53%
Retired	25%	31%	30%
Other	18%	16%	17%
Household Income			
<$35,000	13%	15%	10%
$35,000-$50,000	17%	21%	23%
>$50,000	70%	64%	67%
Average Length of Stay	4.7	4.9	5.1

Exhibit 8

The main overnight destinations for pleasure visitors from New England included: Charlottetown (25%) and Cavendish (23%) (Exhibit 9). The main types of accommodations frequented by New England pleasure visitors in 2002 included: Hotel/Motel (44%), Cottage/Cabin (20%), B&B/Country Inn (14%), VFR/Other (12%), and Campground/Trailer Park (10%) (Exhibit 10).



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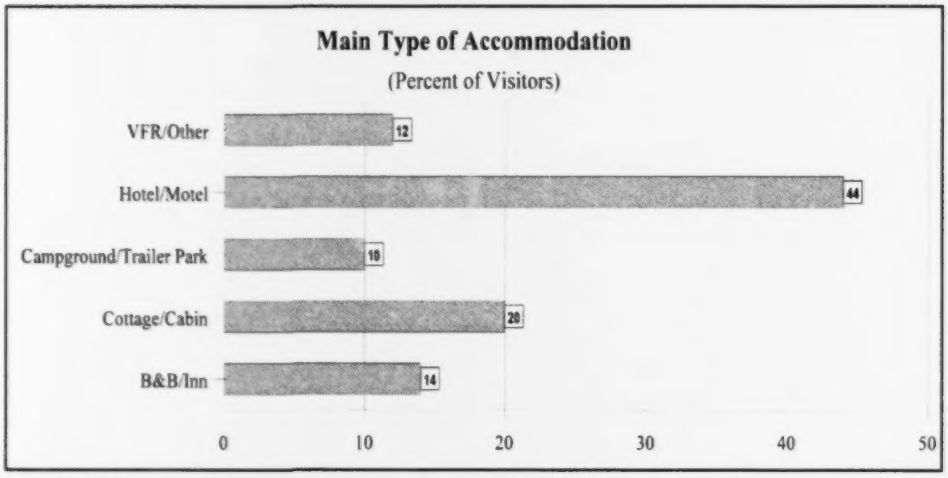


Exhibit 10

The top five activities enjoyed by New England pleasure visitors during their 2002 vacation in Prince Edward Island included: sightseeing (88%), beach visits (77%), craft/souvenir shopping (72%), visiting National Park (58%), and shopping (general merchandise) (58%).

Section 8. Mid-Atlantic

Prince Edward Island experienced a decrease of 7.1% in the number of pleasure parties from Mid-Atlantic, and a decrease of 12.7% in the number of pleasure visitors over last year. Total expenditures by pleasure visitors from Mid-Atlantic showed an increase of 2% from $15.5 million in 2001 to $15.8 million in 2002 (Exhibits 1 - 3).

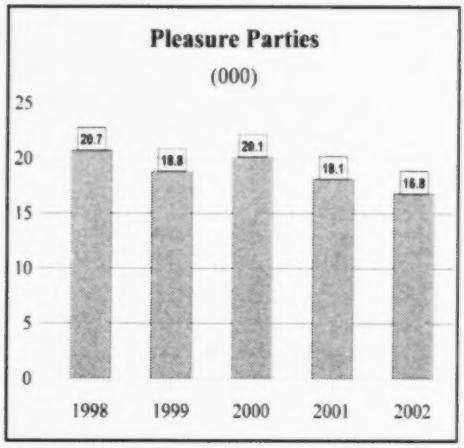


Exhibit 1

Exhibit 2

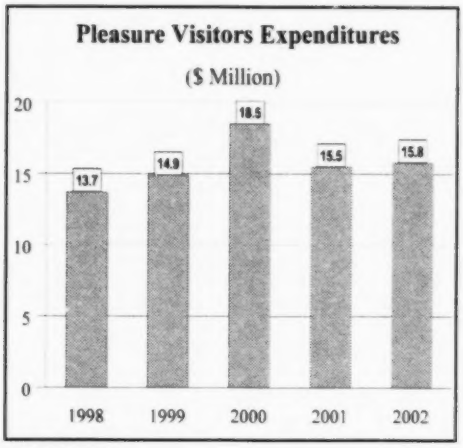
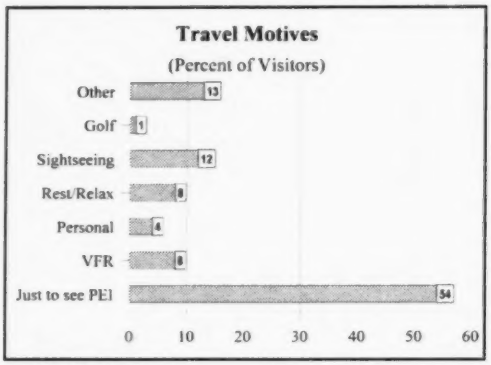


Exhibit 3

The main travel motives expressed by pleasure visitors from the Mid-Atlantic states included; just to see PEI (54%), sightseeing (12%), and rest and relaxation (8%) (Exhibit 4). A large majority (75%) of pleasure visitors from Mid-Atlantic were first time visitors to Prince Edward Island (Exhibit 5).



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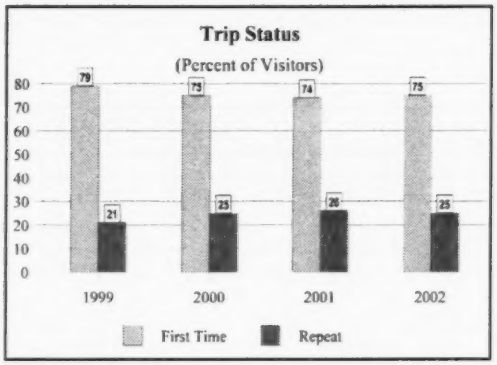
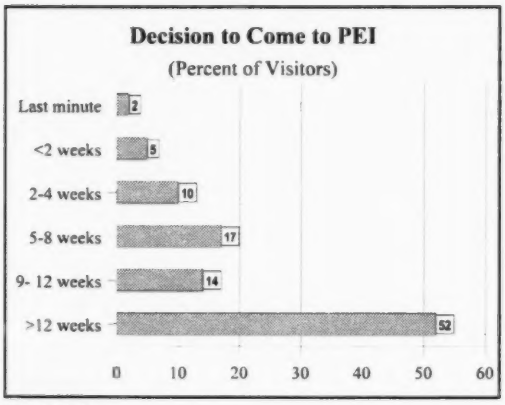


Exhibit 5

The majority (83%) of Mid-Atlantic pleasure visitors made their decision to come to PEI more than four weeks prior to their departure (Exhibit 6). The remaining (17%) of Mid-Atlantic pleasure visitors made their decision to come to PEI four weeks or less before their departure (Exhibit 6).

In 2002, Mid-Atlantic pleasure visitor party composition consisted of 70% adult couples, 16% family with children less than18 years old, 10% groups and 4% single travellers (Exhibit 7).



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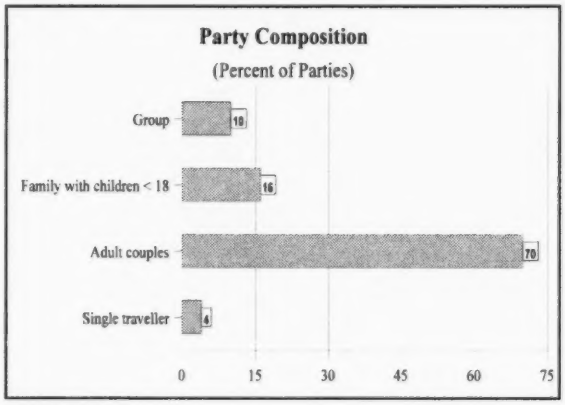


Exhibit 7

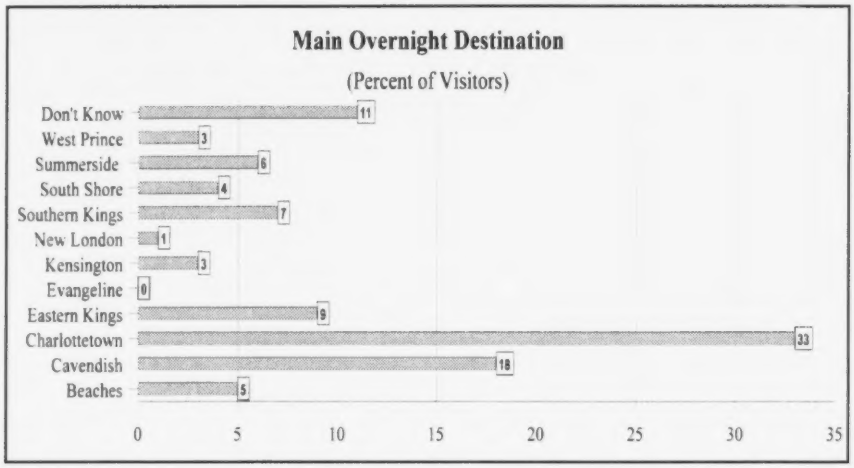
In 2002, a large majority (89%) of pleasure visitors from Mid-Atlantic states were over 40 years of age, with 46% working full time. Eighty percent had annual household incomes greater than $50,000. Mid-Atlantic pleasure visitors spent an average of 4.4 nights in Prince Edward Island during their 2002 vacation (Exhibit 8).

Mid-Atlantic Pleasure Visitors Demographics
(Percent of Visitors)

Age	**2000**	**2001**	**2002**
<40 years	17%	16%	11%
40-59 years	48%	45%	46%
60+ years	35%	39%	43%
Work Status			
Full Time	53%	50%	46%
Retired	31%	37%	39%
Other	16%	13%	15%
Household Income			
<$35,000	9%	9%	9%
$35,000-$50,000	13%	16%	11%
>$50,000	78%	75%	80%
Average Length of Stay	4.7	4.2	4.4

Exhibit 8

The main overnight destinations for pleasure visitors from Mid-Atlantic states included: Charlottetown (33%), Cavendish (18%) (Exhibit 9). The main types of accommodations frequented by Mid-Atlantic pleasure visitors in 2002 included: Hotel/Motel (47%), B&B/Inn (22%), Cottage/Cabin (11%), Campground/Trailer Park (10%) and VFR/Other (10%) (Exhibit 10).



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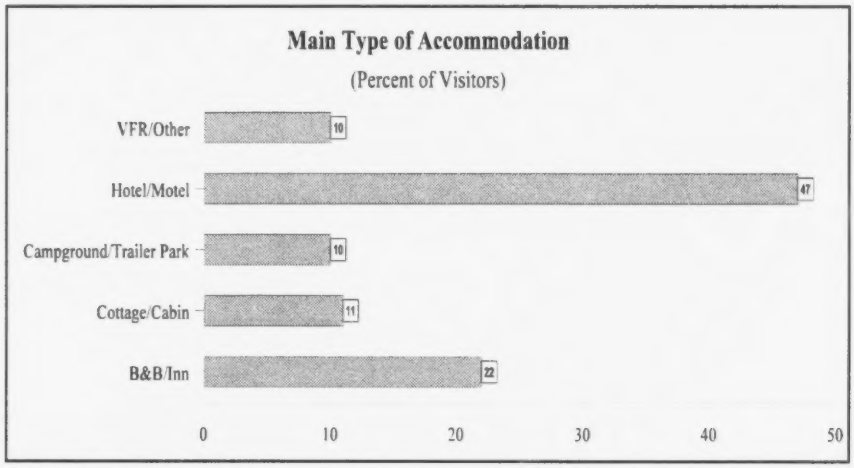


Exhibit 10

The top five activities enjoyed by Mid-Atlantic pleasure visitors during their 2002 vacation in Prince Edward Island included: sightseeing (91%), craft/souvenir shopping (77%), beach visits (71%), driving tours (65%) and visiting National Park (62%).

Section 9. Other US

Prince Edward Island experienced an increase of 6% in the number of pleasure parties from Other US, and an increase of 7% in the number of pleasure visitors over last year. Total expenditures by pleasure visitors from Other US showed an increase of 14.8% from $28.6 million in 2001 to $32.9 million in 2002 (Exhibits 1 - 3).

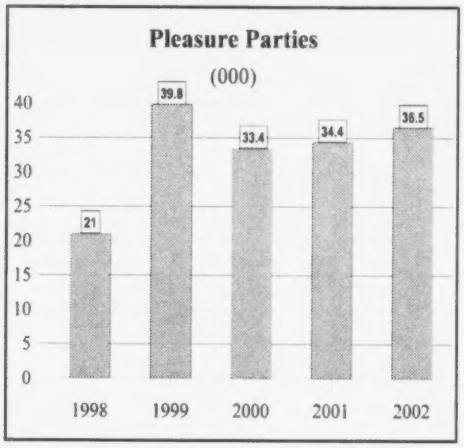
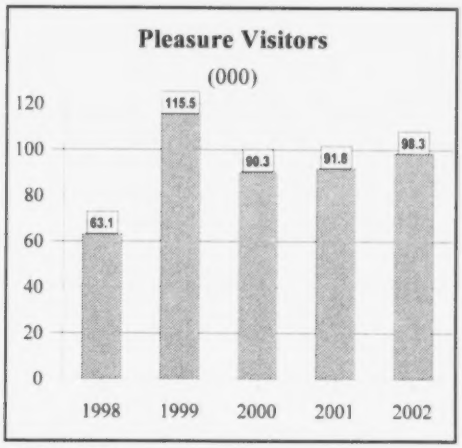


Exhibit 1



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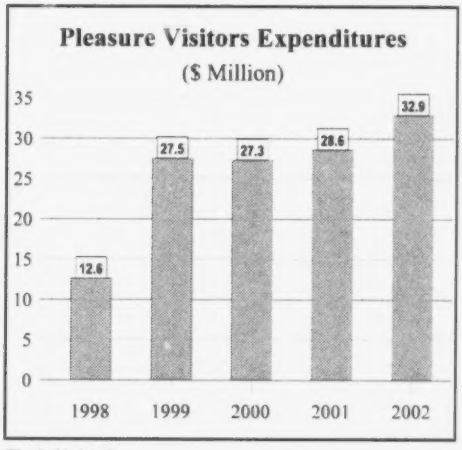
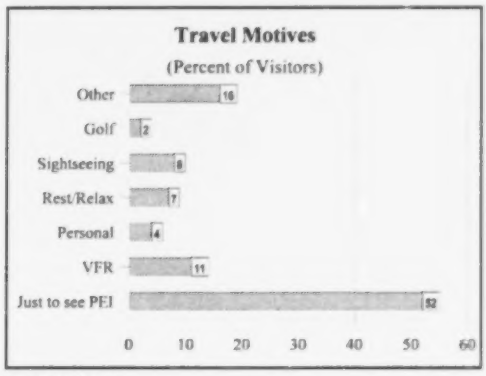


Exhibit 3

The main travel motives expressed by pleasure visitors from Other US included: just to see PEI (52%), visit friends and relatives (11%), sightseeing (8%), and rest, relax and escape (7%) (Exhibit 4). Seventy-nine percent of pleasure visitors from Other US were first time visitors to Prince Edward Island (Exhibit 5).



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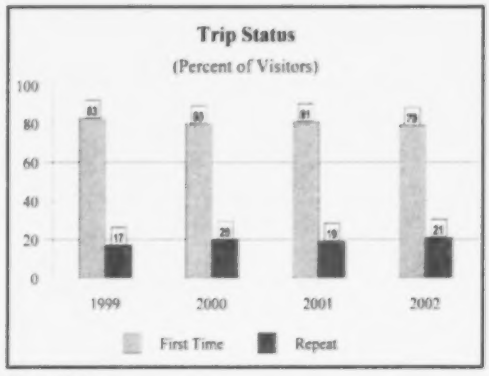
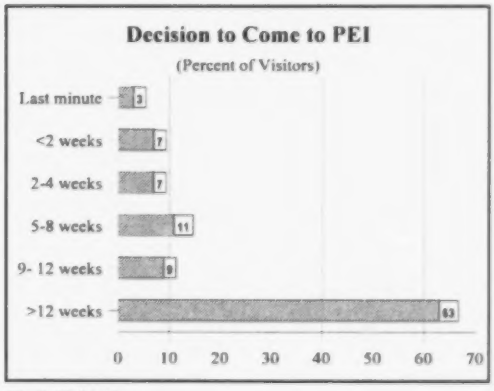


Exhibit 5

The majority (83%) of Other US pleasure visitors made their decision to come to PEI more than four weeks prior to their departure. The remaining (17%) of Other US pleasure visitors made their decision to come to PEI four weeks or less before their departure (Exhibit 6).

In 2002, Other US pleasure visitor party composition consisted of 68% adult couples, 16% family with children less than 18 years old, 11% groups and 5% single travellers (Exhibit 7).



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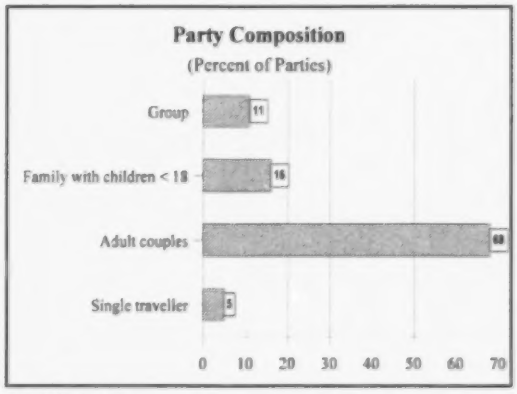


Exhibit 7

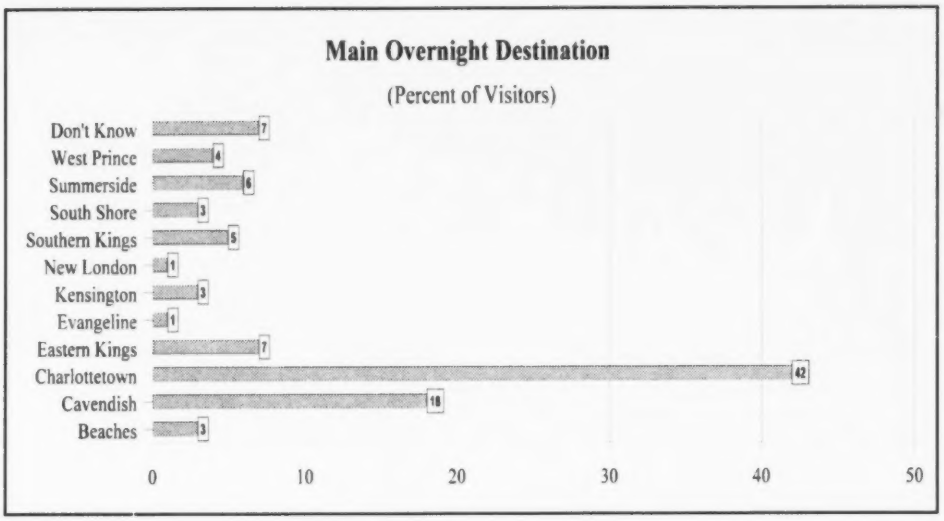
In 2002, the majority (90%) of pleasure visitors from Other US were over 40 years of age, with 43% working full time. Eighty-three percent had annual household incomes greater than $50,000. Other US pleasure visitors spent an average of 4.5 nights in Prince Edward Island during their 2002 vacation (Exhibit 8).

Other US Pleasure Visitors Demographics
(Percent of Visitors)

Age	2000	2001	2002
<40 years	16%	15%	10%
40-59 years	48%	40%	44%
60+ years	36%	45%	46%
Work Status			
Full Time	51%	46%	43%
Retired	31%	41%	42%
Other	18%	13%	15%
Household Income			
<$35,000	9%	11%	7%
$35,000-$50,000	13%	13%	10%
>$50,000	78%	76%	83%
Average Length of Stay	4.3	4.3	4.5

Exhibit 8

The main overnight destinations for pleasure visitors from Other US included: Charlottetown (42%) and Cavendish (18%) (Exhibit 9). The main types of accommodations frequented by Other US pleasure visitors in 2002 included: Hotel/Motel (45%), B&B/Country Inn (25%), Cottage Cabin (13%), VFR/Other (9%) and Campground/Trailer Park (8%) (Exhibit 10).



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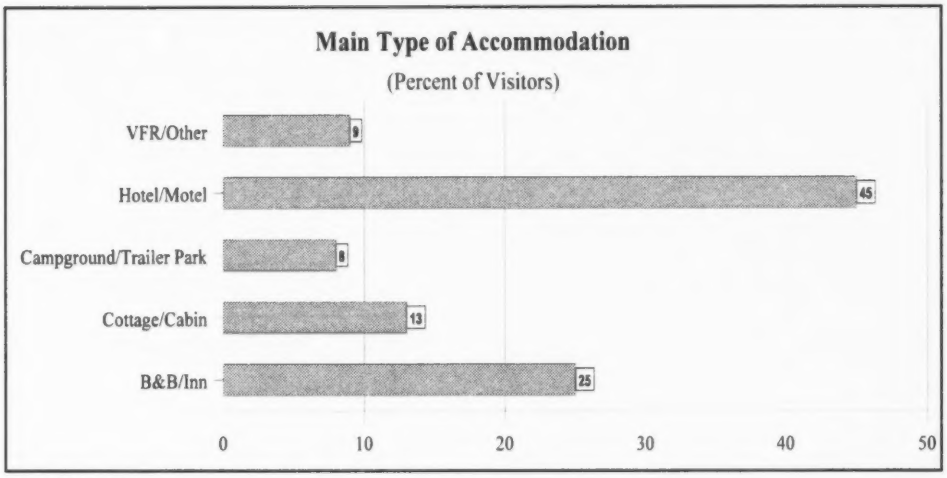


Exhibit 10

The top five activities enjoyed by Other US pleasure visitors during their 2002 vacation in Prince Edward Island included: sightseeing (92%), craft/souvenir shopping (77%), beach visits (75%), driving tour (68%), and visiting National Park (65%).

Section 10. International

Prince Edward Island experienced an increase of 4.6% in the number of pleasure parties from International, and a decline of 8.1% in the number of pleasure visitors over last year. Total expenditures by pleasure visitors from International showed an increase of 8.5% from $8.8 million in 2001 to $9.6 million in 2002 (Exhibits 1 - 3).

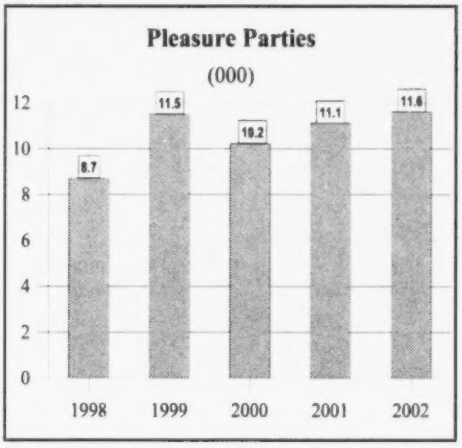
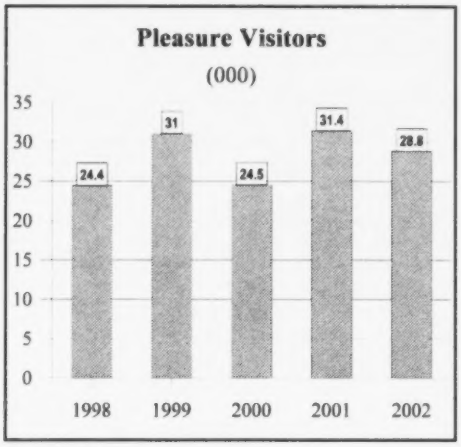


Exhibit 1



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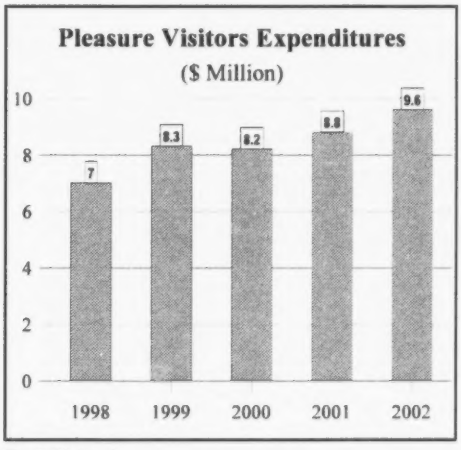
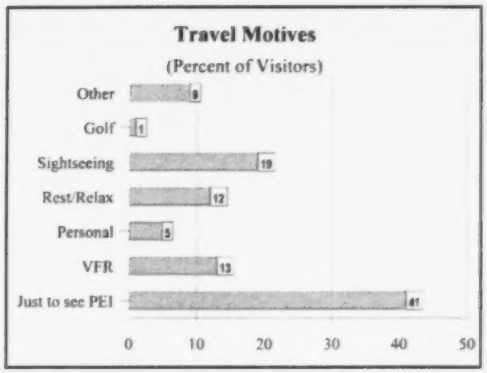


Exhibit 3

The main travel motives expressed by pleasure visitors from International included; just to see PEI (41%), sightseeing (19%), and visiting friends and relatives (13%) (Exhibit 4). The majority (80%) of pleasure visitors from International were first time visitors to Prince Edward Island (Exhibit 5).



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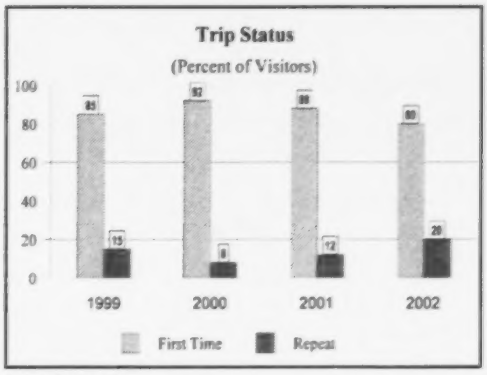


Exhibit 5

The majority (84%) of International pleasure visitors made their decision to come to PEI more than four weeks prior to their departure. The remaining (16%) of International pleasure visitors made their decision to come to PEI four weeks or less before their departure (Exhibit 6).

In 2002, International pleasure visitor party composition consisted of 65% adult couples, 19% family with children less than 18 years old, 9% groups and 7% single travellers (Exhibit 7).

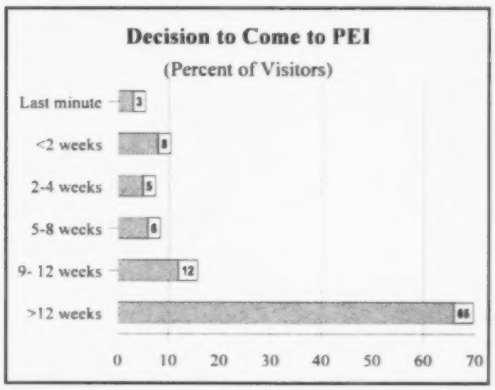


Exhibit 6

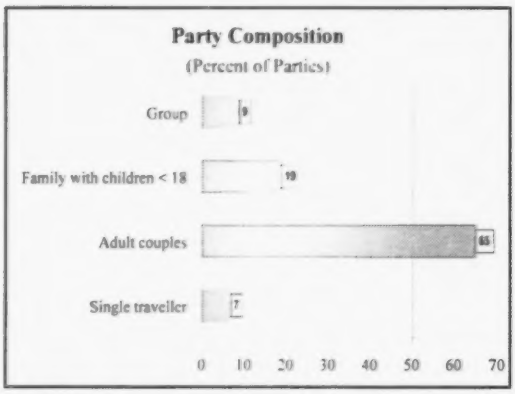


Exhibit 7

In 2002, the majority (72%) of pleasure visitors from International were over 40 years of age, with 50% working full time. Sixty-nine percent had annual household incomes greater than $50,000. International pleasure visitors spent an average of 5.4 nights in Prince Edward Island during their 2002 vacation (Exhibit 8).

International Pleasure Visitors Demographics
(Percent of Visitors)

Age	2000	2001	2002
<40 years	27%	16%	28%
40-59 years	55%	48%	45%
60+ years	18%	36%	27%
Work Status			
Full Time	57%	44%	50%
Retired	18%	43%	24%
Other	25%	13%	26%
Household Income			
<$35,000	11%	18%	12%
$35,000-$50,000	18%	21%	19%
>$50,000	71%	61%	69%
Average Length of Stay	6.6	4.3	5.4

Exhibit 8

The main overnight destinations for pleasure visitors from International included: Charlottetown (57%), and Cavendish (15%)(Exhibit 9). The main types of accommodations frequented by International pleasure visitors in 2002 included: Hotel/Motel (51%), B&B/Country Inn (23%), VFR/Other (15%), Cottage/Cabin (7%) and Campground/Trailer Park (4%) (Exhibit 10).

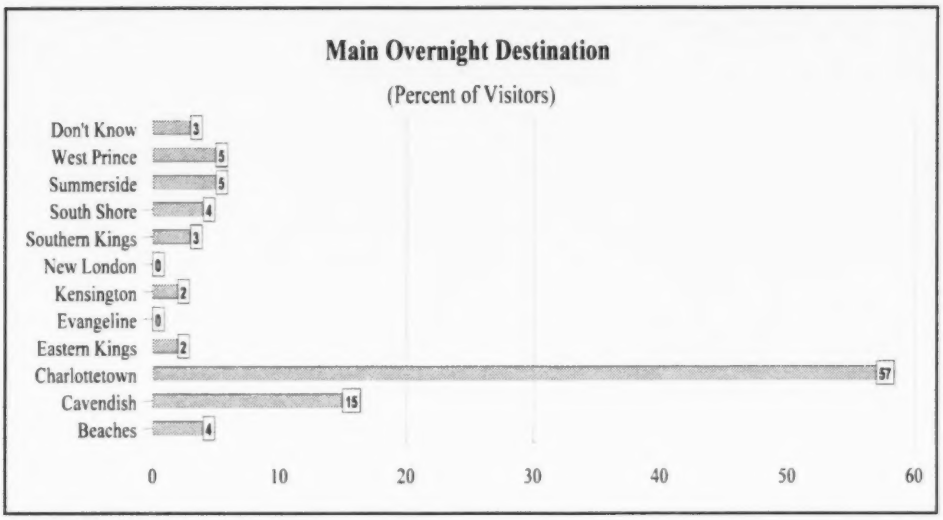


Exhibit 9

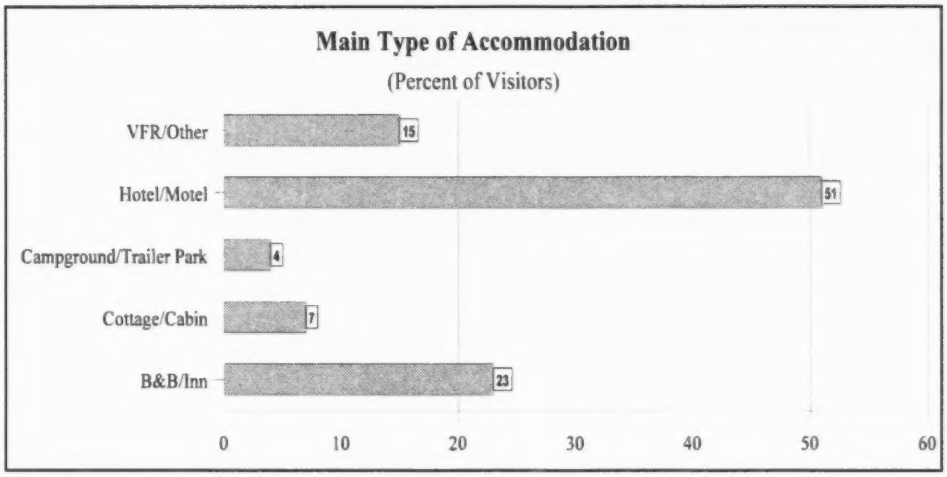


Exhibit 10

The top five activities enjoyed by International pleasure visitors during their 2002 vacation in Prince Edward Island included: sightseeing (96%), beach visits (83%), visiting National Park (78%), craft/souvenir shopping (77%), and driving tours (74%).

Part 6. Prince Edward Island's Tourism Regions

Section 1. Beaches Tourism Region

Section 2. Cavendish Tourism Region

Section 3. Charlottetown Tourism Region

Section 4. Eastern Kings Tourism Region

Section 5. Evangeline Tourism Region

Section 6. Kensington Tourism Region

Section 7. New London Tourism Region

Section 8. Southern Kings Tourism Region

Section 9. South Shore Tourism Region

Section 10. Summerside Tourism Region

Section 11. West Prince Tourism Region

Note: Due to the small sample sizes and resulting wide margins of error for some regions, readers should use this information with caution. Where possible, examining a three or four year trend may provide more useful insights into regional activity.

Section 1. Beaches Tourism Region

Visitor and economic impact information for this region is based on 160 responses from the 2002 Tourism PEI follow-up telephone survey. With this sample size, there is a 95% level of confidence that values are accurate within a range of +/- 7.74%.

Based upon the 2002 follow-up telephone survey of visitors to Prince Edward Island, it is estimated that 5.0% of all pleasure visitors to Prince Edward Island between May 12th and October 31st reported the Beaches tourism region as their main overnight destination. Visitations to the Beaches tourism region showed a decrease of 20% over the previous four-year average (Exhibit 1).

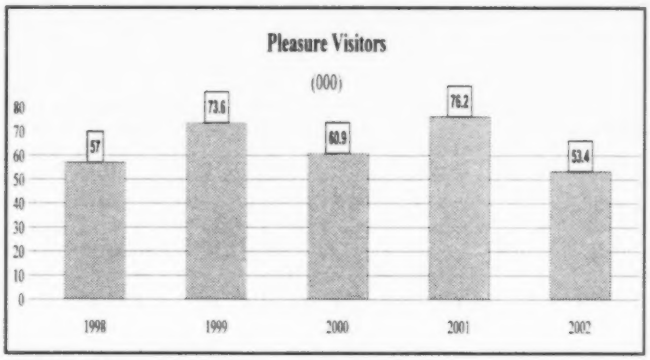


Exhibit 1

Maritime and Ontario origins accounted for almost 60% of the overnight pleasure visitors to the Beaches tourism region in 2002 followed by New England at 12% and Quebec at 9% (Exhibit 2).

	Visitor Origins (Percent of Visitors)			
	1999	2000	2001	2002
Newfoundland	3	1	3	2
Nova Scotia	25	27	20	24
New Brunswick	10	6	9	9
Quebec	8	8	8	9
Ontario	23	22	30	26
Other Canada	6	6	5	6
New England	7	10	11	12
Mid-Atlantic	6	11	4	4
Other US	10	6	8	6
International	3	3	1	2

Exhibit 2

The main travel motives expressed by overnight visitors to the Beaches tourism region included: just to see PEI (37%), rest and relaxation (17%) and VFR (9%) (Exhibit 3). The majority (57%) of overnight visitors to the Beaches tourism region were repeat visitors (Exhibit 4).

Main Travel Motives (Percent of Visitors)	
Just to see PEI	37%
VFR	9%
Personal	8%
Rest, Relaxation	17%
Sightseeing, Touring	9%
Other	20%

Exhibit 3

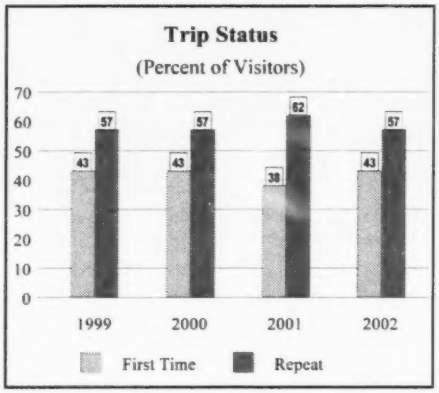


Exhibit 4

In 2002, 94% of overnight visitors to the Beaches tourism region stayed in paid accommodations and 6% overnighted in non-paid accommodations (Exhibit 5).

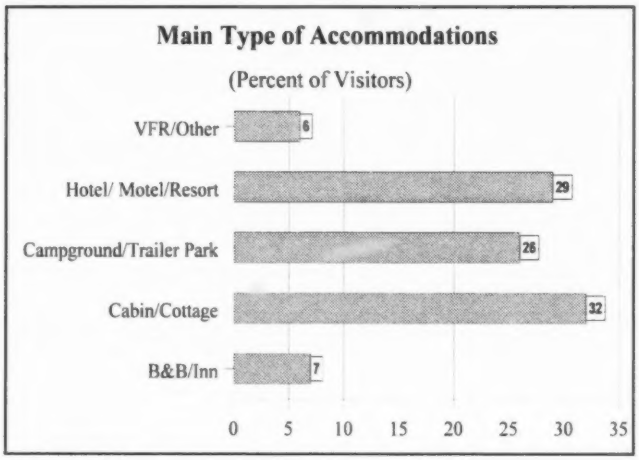


Exhibit 5

Forty-nine percent of visitors who overnighted in the Beaches tourism region made their decision to come to Prince Edward Island more than twelve weeks prior to their departure (Exhibit 6).

In 2002, adult couples accounted for 42% of overnight visitors, while families with children less than 18 years old accounted for 34% of overnight visitors to the Beaches tourism region. Visitors travelling in groups accounted for 19% of visitors and single travellers accounted for the remaining 5% of overnight visitors (Exhibit 7).

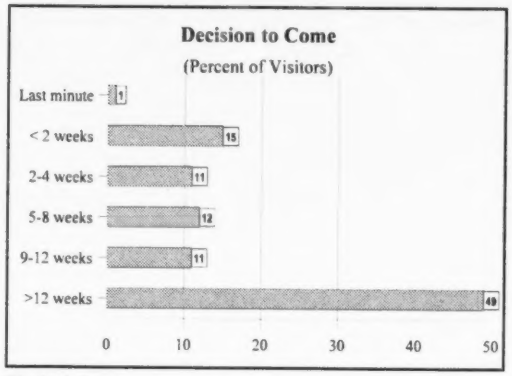


Exhibit 6

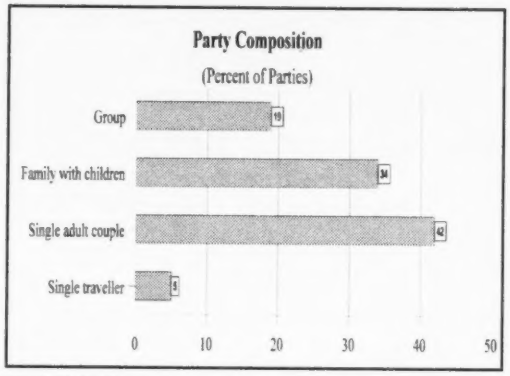


Exhibit 7

Average party expenditures for visitors who overnighted in the Beaches tourism region remained relatively unchanged from 2001 (Exhibit 8). In 2002, two expenditure items, accommodations and restaurant meals, accounted for 58% of total expenditures (Exhibit 9). It is estimated that total expenditures by visitors who overnighted in the Beaches tourism region was $19 million in 2002. *(Please note that all of these expenditures may not have occurred in the region.)*

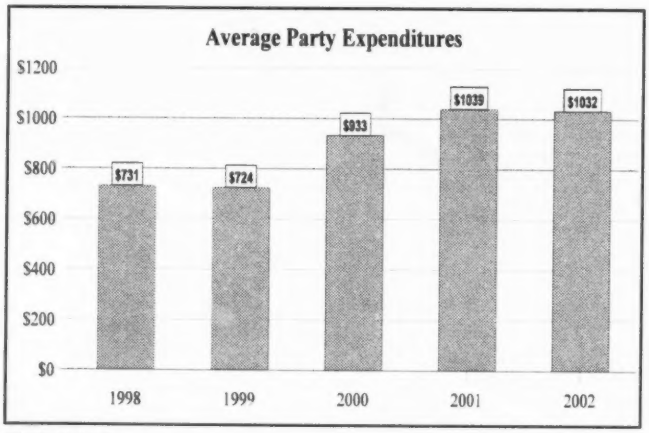


Exhibit 8

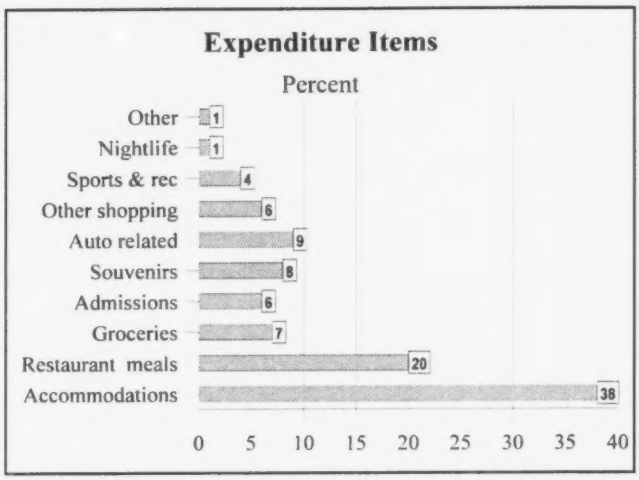


Exhibit 9

The majority (74%) of overnight visitors to the Beaches tourism region were over 40 years of age, 67% had annual household incomes over $50,000 and 64% worked full time. Overnight visitors to the Beaches tourism region spent an average of 5.2 nights in Prince Edward Island (Exhibit 10).

Beaches Overnight Visitor Demographics						
		1998	**1999**	**2000**	**2001**	**2002**
Age	<40 years	30%	34%	30%	32%	26%
	40+ years	70%	66%	70%	68%	74%
Income	<$50,000	29%	40%	30%	26%	33%
	$50,000+	71%	60%	70%	74%	67%
Employment	Full Time	67%	56%	58%	61%	64%
	Retired	19%	19%	20%	23%	20%
	Other	14%	25%	22%	16%	16%
Nights in PEI		6.0	5.4	5.1	6.1	5.2

Exhibit 10

The top ten activities enjoyed by visitors who overnighted in the Beaches tourism region during their Prince Edward Island vacation in 2002 are listed in Exhibit 11.

Beaches Overnight Visitor Activities	
Activity	**Percent of Visitors**
Sightseeing	87%
Beach visits	85%
Visiting National Park	75%
Souvenir shopping	66%
Driving tours	63%
General merchandise shopping	54%
Lobster suppers	42%
Visiting historical/cultural attractions	41%
Visiting Anne attractions	41%
Canada's Birthplace attractions	33%

Exhibit 11

Section 2. Cavendish Tourism Region

Visitor and economic impact information for this region is based on 853 responses from the 2002 Tourism PEI follow-up telephone survey. With this sample size, there is a 95% level of confidence that values are accurate within a range of +/-3.35%.

Based upon the 2002 follow-up telephone survey of visitors to Prince Edward Island, it is estimated that 26.2% of all pleasure visitors to Prince Edward Island between May 12th and October 31st reported the Cavendish tourism region as their main overnight destination. Visitations to the Cavendish tourism region, although higher than last year, showed a decrease of 6% over the previous four-year average (Exhibit 1).

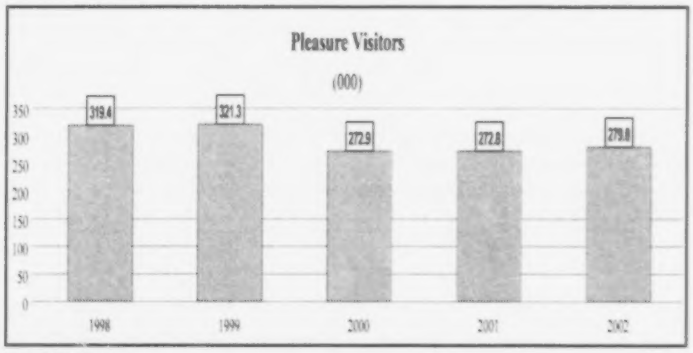


Exhibit 1

Maritime and Ontario origins accounted for 59% of overnight pleasure visitors to the Cavendish tourism region in 2002 followed by Quebec at 11% and Other Canada at 8% (Exhibit 2).

	Visitor Origins (Percent of Visitors)			
	1999	2000	2001	2002
Newfoundland	5	4	4	3
Nova Scotia	21	18	22	19
New Brunswick	14	14	14	13
Quebec	12	9	12	11
Ontario	21	26	21	27
Other Canada	6	6	6	8
New England	7	8	8	8
Mid-Atlantic	4	5	4	3
Other US	8	8	7	6
International	2	1	2	2

Exhibit 2

The main travel motives expressed by overnight visitors to the Cavendish tourism region included: just to see PEI (47%), rest and relaxation (16%) and VFR (9%) (Exhibit 3). The majority (58%) of overnight visitors to the Cavendish tourism region were repeat visitors (Exhibit 4).

Main Travel Motives (Percent of Visitors)	
Just to see PEI	47%
VFR	9%
Personal	7%
Rest, Relaxation	16%
Sightseeing, Touring	7%
Other	14%

Exhibit 3

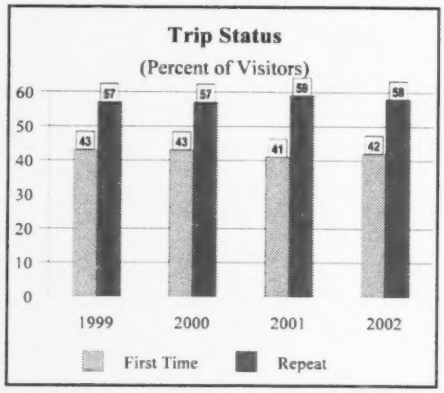


Exhibit 4

In 2002, 95% of overnight visitors to the Cavendish tourism region stayed in paid accommodations and 5% overnighted in non-paid accommodations (Exhibit 5).

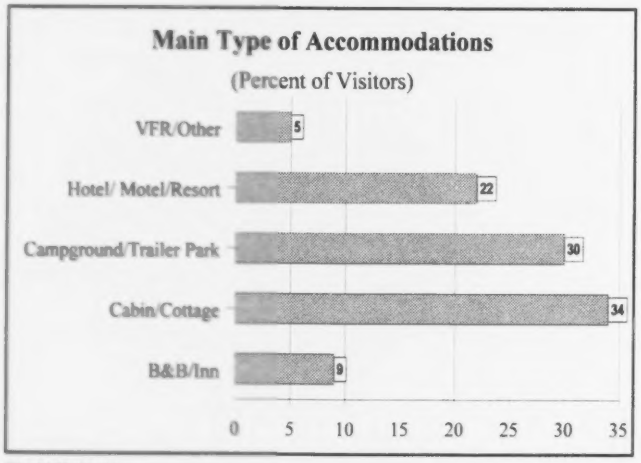


Exhibit 5

Forty-seven percent of visitors who overnighted in the Cavendish tourism region made their decision to come to Prince Edward Island more than twelve weeks prior to their departure (Exhibit 6).

In 2002, families with children less than 18 years old accounted for 42% of overnight visitors to the Cavendish tourism region, while adult couples accounted for 37% of overnight visitors. Visitors travelling in groups accounted for 18% of visitors and single travellers accounted for the remaining 3% of overnight visitors (Exhibit 7).

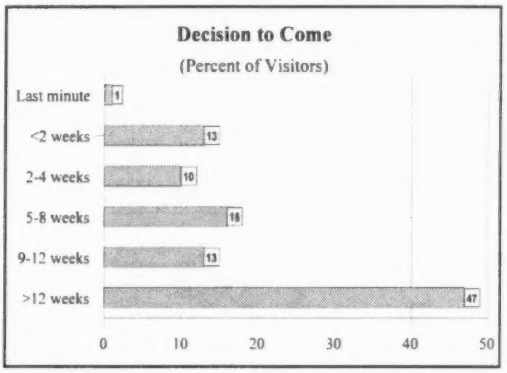


Exhibit 6

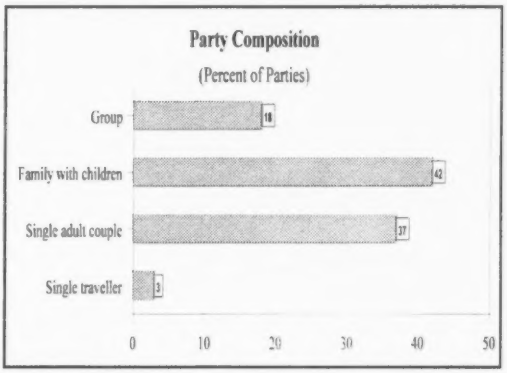


Exhibit 7

Average party expenditures for visitors who overnighted in the Cavendish tourism region increased 12.1% from $821 in 2001 to $920 in 2002 (Exhibit 8). In 2002, three expenditure items, accommodations, restaurant meals and souvenirs accounted for 65% of total expenditures (Exhibit 9). It is estimated that total expenditures by visitors who overnighted in the Cavendish tourism region was $77.3 million in 2002. *(Please note that all of these expenditures may not have occurred in the main overnight region.)*

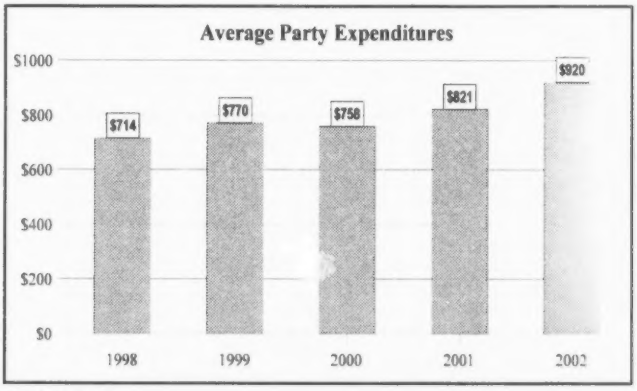


Exhibit 8

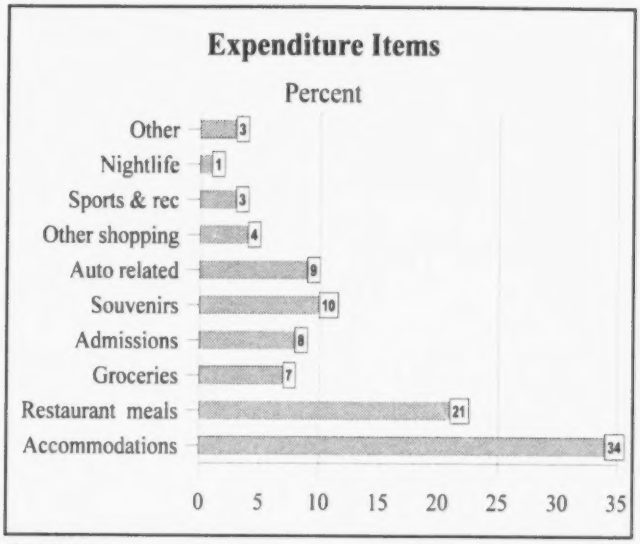


Exhibit 9

The majority (70%) of overnight visitors to the Cavendish tourism region were over 40 years of age, 69% had annual household incomes over $50,000 and 64% worked full time. Overnight visitors to the Cavendish tourism region spent an average of 4.4 nights in Prince Edward Island (Exhibit 10).

Cavendish Overnight Visitor Demographics						
		1998	**1999**	**2000**	**2001**	**2002**
Age	<40 years	38%	39%	33%	35%	30%
	40+ years	62%	61%	67%	65%	70%
Income	<$50,000	35%	41%	32%	33%	31%
	$50,000+	65%	59%	68%	66%	69%
Employment	Full Time	66%	59%	66%	66%	64%
	Retired	21%	20%	17%	20%	19%
	Other	13%	21%	17%	14%	17%
Nights in PEI		4.2	4.1	4.2	4.2	4.4

Exhibit 10

The top ten activities enjoyed by visitors who overnighted in the Cavendish tourism region during their Prince Edward Island vacation in 2002 are listed in Exhibit 11.

Cavendish Overnight Visitor Activities	
Activity	**Percent of Visitors**
Sightseeing	83%
Beach visits	82%
Souvenir shopping	75%
Visiting National Park	69%
General merchandise shopping	57%
Driving tours	57%
Visiting Anne attractions	52%
Lobster suppers	52%
Visiting historical/cultural attractions	40%
Fun/Theme parks	35%

Exhibit 11

Section 3. Charlottetown Tourism Region

Visitor and economic impact information for this region is based on 991 responses from the 2002 Tourism PEI follow-up telephone survey. With this sample size, there is a 95% level of confidence that values are accurate within a range of +/-3.11%.

Based upon the 2002 follow-up telephone survey of visitors to Prince Edward Island, it is estimated that 30.5% of all pleasure visitors to Prince Edward Island between May 12th and October 31st reported the Charlottetown tourism region as their main overnight destination. Visitations to the Charlottetown tourism region, although higher than last year, showed a decrease of 3% over the previous four-year average (Exhibit 1).

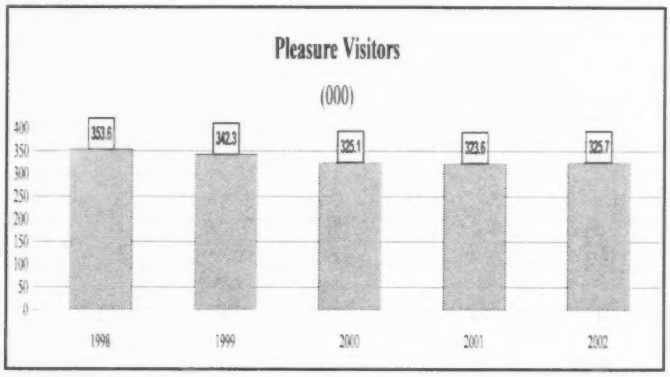


Exhibit 1

Maritime and Ontario origins accounted for 54% of overnight pleasure visitors to the Charlottetown tourism region in 2002 followed by Other US at 13% and Other Canada at 9% (Exhibit 2).

	Visitor Origins (Percent of Visitors)			
	1999	2000	2001	2002
Newfoundland	2	4	3	2
Nova Scotia	19	17	20	18
New Brunswick	11	11	8	8
Quebec	6	7	5	6
Ontario	26	24	27	28
Other Canada	9	9	9	9
New England	5	7	6	7
Mid-Atlantic	6	7	5	4
Other US	13	11	12	13
International	3	4	5	5

Exhibit 2

The main travel motives expressed by overnight visitors to the Charlottetown tourism region included: just to see PEI (42%), VFR (19%) and rest and relaxation (8%) (Exhibit 3). A slight majority (52%) of overnight visitors to the Charlottetown tourism region were repeat visitors (Exhibit 4).

Main Travel Motives (Percent of Visitors)	
Just to see PEI	42%
VFR	19%
Personal	5%
Rest, Relaxation	8%
Sightseeing, Touring	6%
Other	20%

Exhibit 3

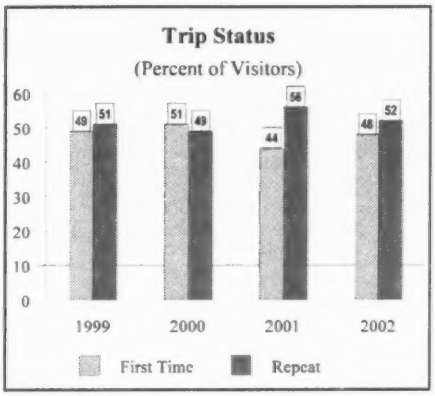


Exhibit 4

In 2002, 83% of overnight visitors to the Charlottetown tourism region stayed in paid accommodations and 17% overnighted in non-paid accommodations (Exhibit 5).

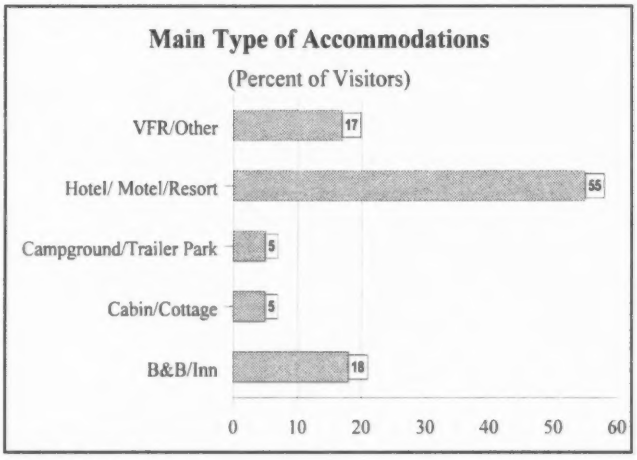


Exhibit 5

Forty-three percent of visitors who overnighted in the Charlottetown tourism region made their decision to come to Prince Edward Island more than twelve weeks prior to their departure (Exhibit 6).

In 2002, adult couples accounted for 57% of overnight visitors, while families with children less than 18 years old accounted for 15% of overnight visitors to the Charlottetown tourism region. Visitors travelling in groups accounted for 21% of visitors and single travellers accounted for the remaining 7% of overnight visitors (Exhibit 7).

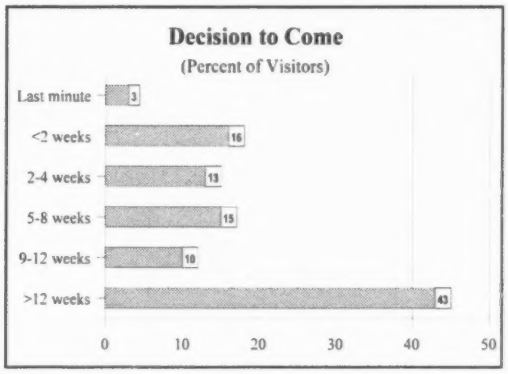


Exhibit 6

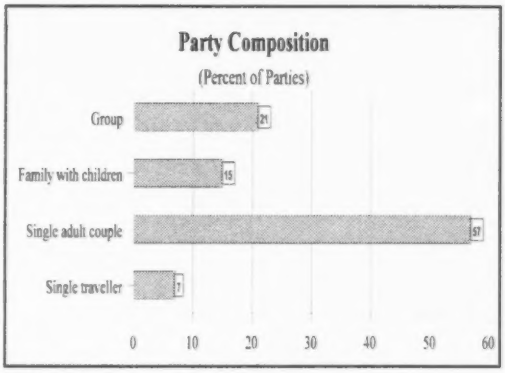


Exhibit 7

Average party expenditures for visitors who overnighted in the Charlottetown tourism region increased 5.8% from $743 in 2001 to $786 in 2002 (Exhibit 8). In 2002, three expenditure items, accommodations, restaurant meals and souvenirs accounted for 68% of total expenditures (Exhibit 9). It is estimated that total expenditures by visitors who overnighted in the Charlottetown tourism region was $100.8 million in 2002. *(Please note that all of these expenditures may not have occurred in the main overnight region.)*

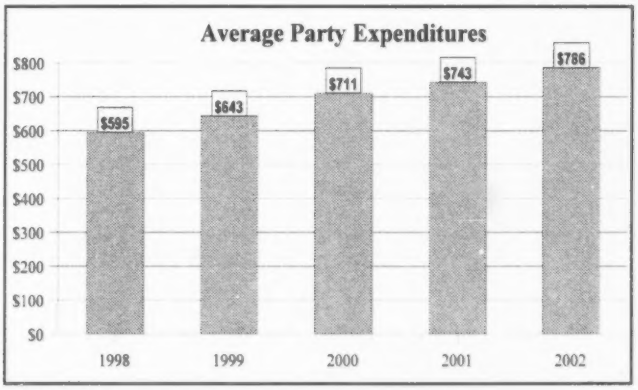


Exhibit 8

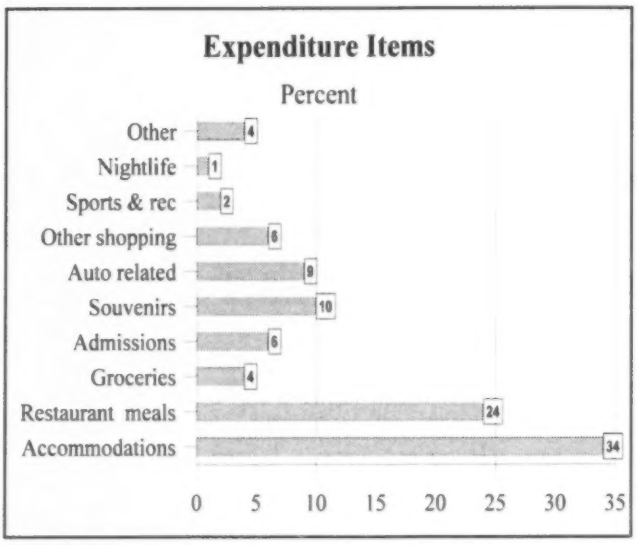


Exhibit 9

The majority (81%) of overnight visitors to the Charlottetown tourism region were over 40 years of age, 69% had annual household incomes over $50,000 and 49% percent worked full time. Overnight visitors to the Charlottetown tourism region spent an average of 3.9 nights in Prince Edward Island (Exhibit 10).

Charlottetown Overnight Visitor Demographics						
		1998	**1999**	**2000**	**2001**	**2002**
Age	<40 years	25%	25%	24%	20%	19%
	40+ years	75%	75%	76%	80%	81%
Income	<$50,000	28%	40%	33%	34%	31%
	$50,000+	72%	60%	67%	66%	69%
Employment	Full Time	56%	52%	56%	53%	49%
	Retired	26%	28%	23%	31%	32%
	Other	18%	20%	21%	16%	19%
Nights in PEI		3.6	4.1	3.8	4.1	3.9

Exhibit 10

The top ten activities enjoyed by visitors who overnighted in the Charlottetown tourism region during their Prince Edward Island vacation in 2002 are listed in Exhibit 11.

Charlottetown Overnight Visitor Activities	
Activity	**Percent of Visitors**
Sightseeing	82%
Souvenir shopping	69%
Beach visits	60%
Driving tours	55%
General merchandise shopping	54%
Visiting National Park	51%
Visiting historical/cultural attractions	47%
Lobster suppers	45%
Canada's Birthplace attractions	42%
Visiting Anne attractions	41%

Exhibit 11

Section 4. Eastern Kings Tourism Region

Visitor and economic impact information for this region is based on 200 responses from the 2002 Tourism PEI follow-up telephone survey. With this sample size, there is a 95% level of confidence that values are accurate within a range of +/-6.92%.

Based upon the 2002 follow-up telephone survey of visitors to Prince Edward Island, it is estimated that 6.4% of all pleasure visitors to Prince Edward Island between May 12th and October 31st reported the Eastern Kings tourism region as their main overnight destination. Visitations to the Eastern Kings tourism region showed an increase of 18% over the previous four-year average (Exhibit 1).

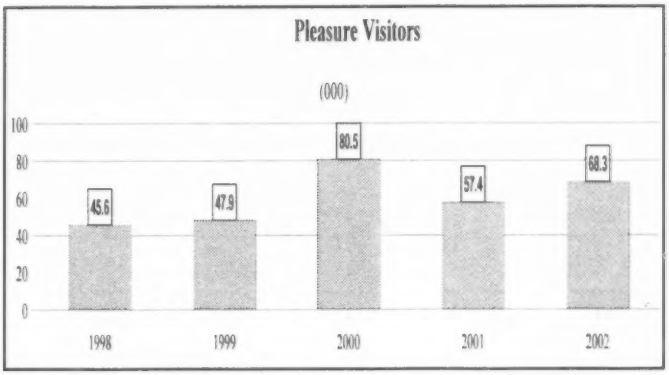


Exhibit 1

Maritime and Ontario origins accounted for 61% of overnight pleasure visitors to the Eastern Kings tourism region in 2002 followed by New England at 11% and Other US at 10% (Exhibit 2).

	Visitor Origins (Percent of Visitors)			
	1999	2000	2001	2002
Newfoundland	1	2	1	1
Nova Scotia	27	25	18	37
New Brunswick	2	12	7	6
Quebec	13	8	10	6
Ontario	26	23	29	18
Other Canada	3	6	9	4
New England	15	11	10	11
Mid-Atlantic	4	6	6	6
Other US	5	6	6	10
International	6	2	2	1

Exhibit 2

The main travel motives expressed by overnight visitors to the Eastern Kings tourism region included: just to see PEI (26%), VFR (26%) and rest and relaxation (15%) (Exhibit 3). A majority (74%) of overnight visitors to the Eastern Kings tourism region were repeat visitors (Exhibit 4).

Main Travel Motives (Percent of Visitors)	
Just to see PEI	26%
VFR	26%
Personal	10%
Rest, Relaxation	15%
Sightseeing, Touring	4%
Other	19%

Exhibit 3

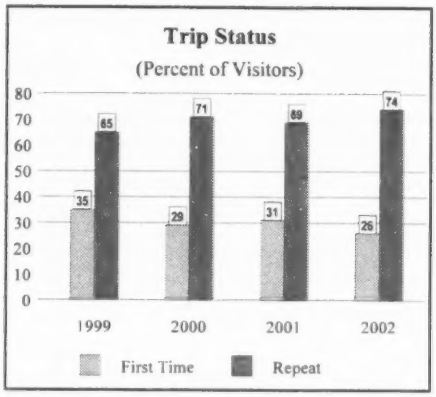


Exhibit 4

In 2002, 72% of overnight visitors to the Eastern Kings tourism region stayed in paid accommodations and 28% overnighted in non-paid accommodations (Exhibit 5).

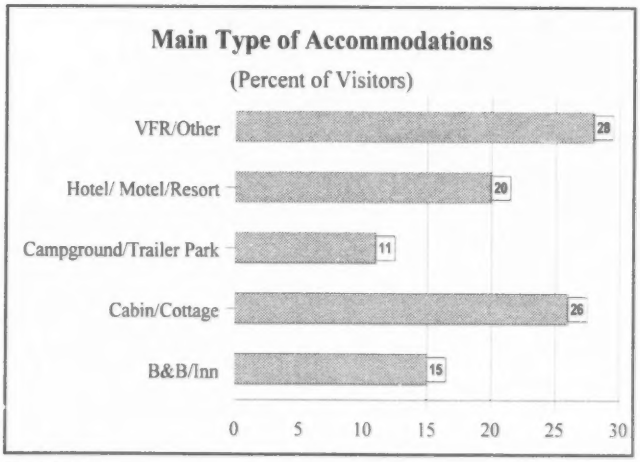


Exhibit 5

Forty-five percent of visitors who overnighted in the Eastern Kings tourism region made their decision to come to Prince Edward Island more than twelve weeks prior to their departure (Exhibit 6).

In 2002, adult couples accounted for 49% of overnight visitors, while families with children less than 18 years old accounted for 25% of overnight visitors to the Eastern Kings tourism region. Visitors travelling in groups accounted for 21% of visitors and single travellers accounted for the remaining 6% of overnight visitors (Exhibit 7).

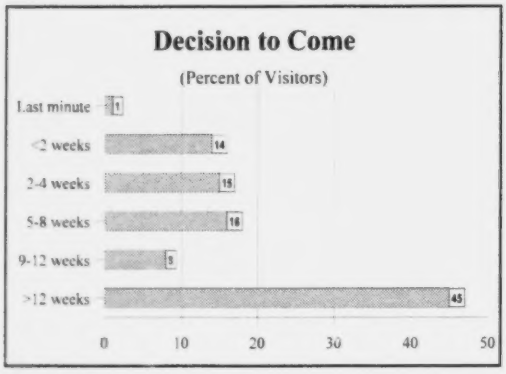


Exhibit 6

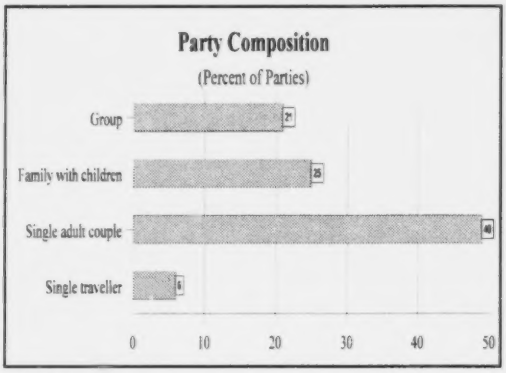


Exhibit 7

Average party expenditures for visitors who overnighted in the Eastern Kings tourism region decreased 13.8% from $1018 in 2001 to $878 in 2002 (Exhibit 8). In 2002, three expenditure items, accommodations, restaurant meals and auto related accounted for 64% of total expenditures (Exhibit 9). It is estimated that total expenditures by visitors who overnighted in the Eastern Kings tourism region was $20.1 million in 2002. *(Please note that all of these expenditures may not have occurred in the main overnight region.)*

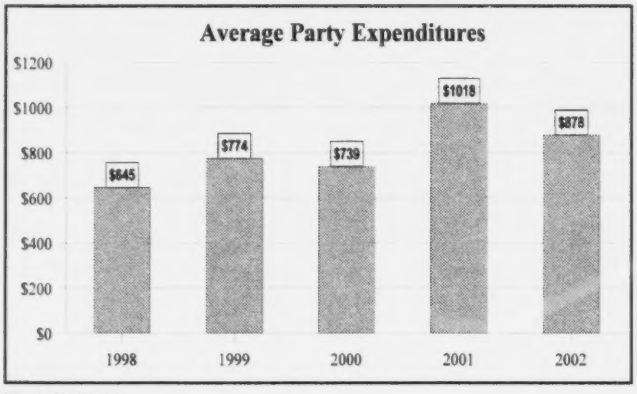


Exhibit 8

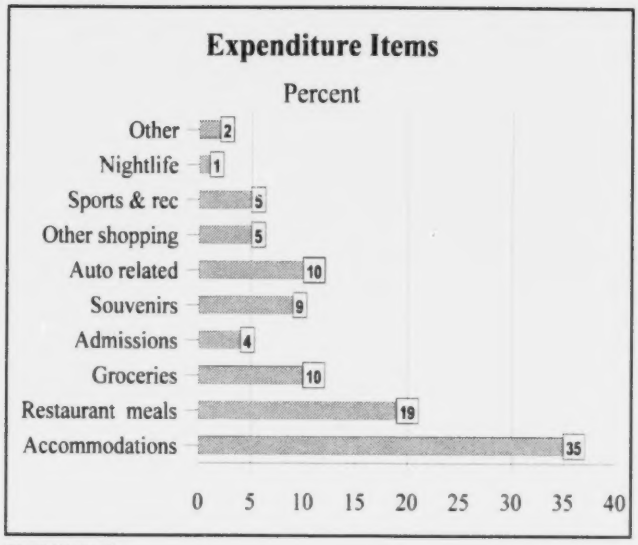


Exhibit 9

The majority (84%) of overnight visitors to the Eastern Kings tourism region were over 40 years of age, 61% had annual household incomes over $50,000 and 48% worked full time. Overnight visitors to the Eastern Kings tourism region spent an average of 5.7 nights in Prince Edward Island (Exhibit 10).

Eastern Kings Overnight Visitor Demographics						
		1998	**1999**	**2000**	**2001**	**2002**
Age	<40 years	23%	34%	25%	22%	16%
	40+ years	77%	66%	75%	78%	84%
Income	<$50,000	35%	37%	26%	23%	39%
	$50,000+	65%	63%	74%	77%	61%
Employment	Full Time	67%	60%	60%	69%	48%
	Retired	18%	24%	23%	21%	37%
	Other	15%	16%	17%	10%	15%
Nights in PEI		6.5	6.3	5.0	6.7	5.7

Exhibit 10

The top ten activities enjoyed by visitors who overnighted in the Eastern Kings tourism region during their Prince Edward Island vacation in 2002 are listed in Exhibit 11.

Eastern Kings Overnight Visitor Activities	
Activity	**Percent of Visitors**
Beach visits	71%
Sightseeing	70%
General merchandise shopping	60%
Souvenir shopping	59%
Driving tours	53%
Visiting friends & relatives	47%
Visiting National Park	35%
Lobster suppers	32%
Visiting historical/cultural attractions	27%
Bird watching	24%

Exhibit 11

Section 5. Evangeline Tourism Region

Visitor and economic impact information for this region is based on 11 responses from the 2002 Tourism PEI follow-up telephone survey. With this sample size, there is a 95% level of confidence that values are accurate within a range of +/-29.48%.

Based upon the 2002 follow-up telephone survey of visitors to Prince Edward Island, it is estimated that 0.2% of all pleasure visitors to Prince Edward Island between May 12th and October 31st reported the Evangeline tourism region as their main overnight destination. Visitations to the Evangeline tourism region showed a decrease of 80% over the previous year (Exhibit 1).

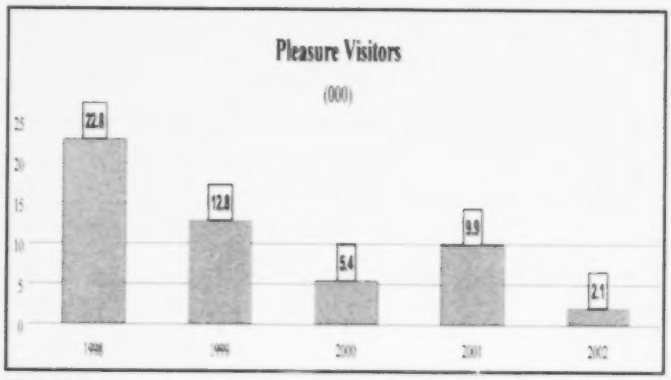


Exhibit 1

Maritime and New England origins accounted for 56% of overnight pleasure visitors to the Evangeline tourism region in 2002 followed by Quebec at 16% and Other US at 12% (Exhibit 2).

	Visitor Origins (Percent of Visitors)			
	1999	2000	2001	2002
Newfoundland			2	
Nova Scotia	7		13	
New Brunswick	18	22	32	30
Quebec	15	7	10	16
Ontario	26	40	22	
Other Canada	15		3	11
New England	4	13	10	26
Mid-Atlantic		2	2	5
Other US	15	7	6	12
International				

Exhibit 2

The main travel motives expressed by overnight visitors to the Evangeline tourism region included: just to see PEI (19%), VFR (18%) and rest and relaxation (18%) (Exhibit 3). A majority (58%) of overnight visitors to the Evangeline tourism region were repeat visitors (Exhibit 4).

Main Travel Motives (Percent of Visitors)	
Just to see PEI	19%
VFR	18%
Special Event	20%
Rest, Relaxation	8%
Sightseeing, Touring	18%
Other	17%

Exhibit 3

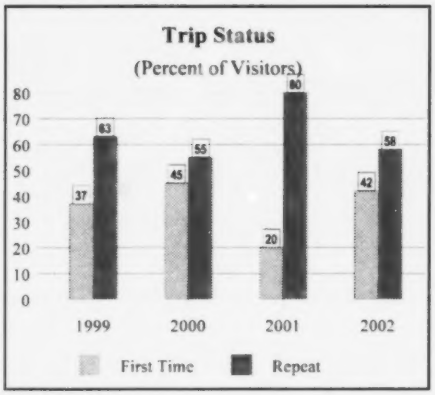


Exhibit 4

In 2002, 82% of overnight visitors to the Evangeline tourism region stayed in paid accommodations and 18% overnighted in non-paid accommodations (Exhibit 5).

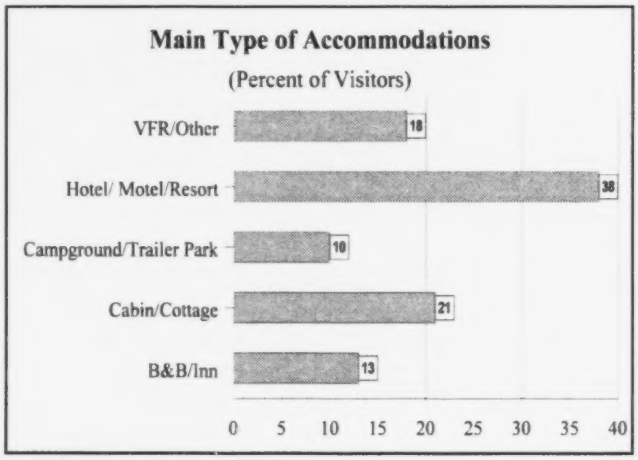


Exhibit 5

Sixty-seven percent of visitors who overnighted in the Evangeline tourism region made their decision to come to Prince Edward Island more than twelve weeks prior to their departure (Exhibit 6).

In 2002, adult couples accounted for 54% of overnight visitors to the Evangeline tourism region. Visitors travelling in groups accounted for 38% of visitors and single travellers accounted for the remaining 8% of overnight visitors (Exhibit 7).

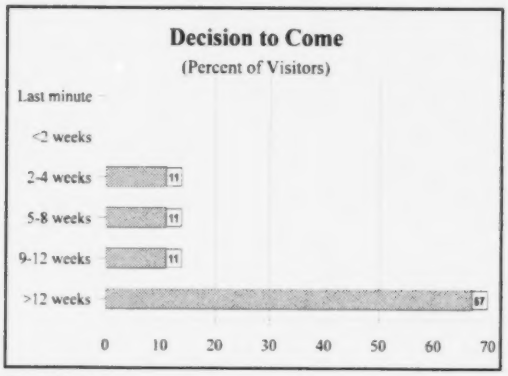


Exhibit 6

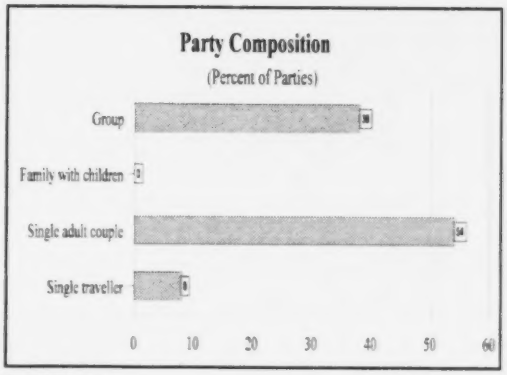


Exhibit 7

Average party expenditures for visitors who overnighted in the Evangeline tourism region increased 5% from $838 in 2001 to $880 in 2002 (Exhibit 8). In 2002, three expenditure items, accommodations, restaurant meals and auto related accounted for 64% of total expenditures (Exhibit 9). It is estimated that total expenditures by visitors who overnighted in the Evangeline tourism region was $0.6 million in 2002. *(Please note that all of these expenditures may not have occurred in the main overnight region.)*

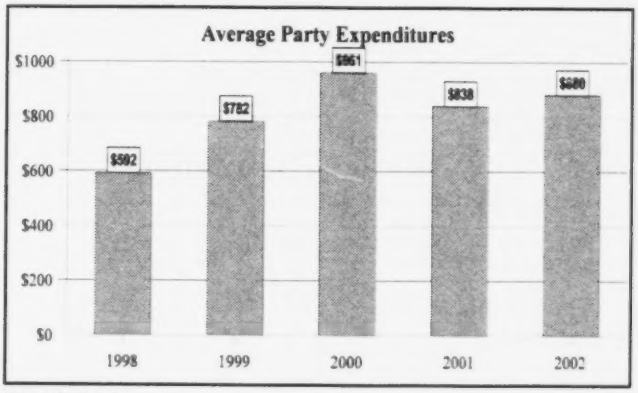


Exhibit 8

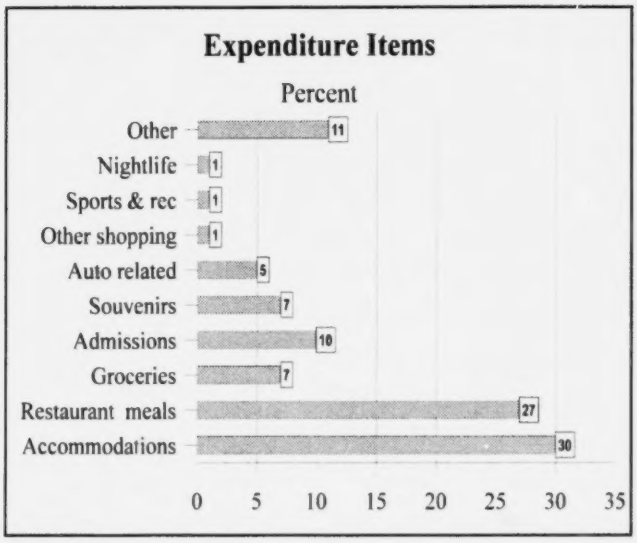


Exhibit 9

The majority (81%) of overnight visitors to the Evangeline tourism region were over 40 years of age, 50% had annual household incomes over $50,000 and 40% worked full time. Overnight visitors to the Evangeline tourism region spent an average of 6.4 nights in Prince Edward Island (Exhibit 10).

Evangeline Overnight Visitor Demographics						
		1998	**1999**	**2000**	**2001**	**2002**
Age	<40 years	29%	40%	43%	28%	19%
	40+ years	71%	60%	57%	72%	81%
Income	<$50,000	53%	30%	9%	28%	50%
	$50,000+	47%	70%	91%	72%	50%
Employment	Full Time	57%	67%	46%	58%	40%
	Retired	24%	15%	30%	26%	40%
	Other	19%	18%	24%	16%	20%
Nights in PEI		4.6	7.0	5.2	5.1	6.4

Exhibit 10

The top ten activities enjoyed by visitors who overnighted in the Evangeline tourism region during their Prince Edward Island vacation in 2002 are listed in Exhibit 11.

Evangeline Overnight Visitor Activities	
Activity	**Percent of Visitors**
Sightseeing	90%
Experiencing Acadian Culture	73%
Souvenir shopping	72%
Beach visits	71%
Driving tours	67%
Visiting National Park	64%
Visiting Anne attractions	64%
General merchandise shopping	54%
Visiting historical/cultural attractions	50%
Live theatre	35%

Exhibit 11

Section 6. Kensington Tourism Region

Visitor and economic impact information for this region is based on 116 responses from the 2002 Tourism PEI follow-up telephone survey. With this sample size, there is a 95% level of confidence that values are accurate within a range of +/-9.09%.

Based upon the 2002 follow-up telephone survey of visitors to Prince Edward Island, it is estimated that 3.6% of all pleasure visitors to Prince Edward Island between May 12th and October 31st reported the Kensington tourism region as their main overnight destination. Visitations to the Kensington tourism region showed an increase of 0.8% over the previous four-year average (Exhibit 1).

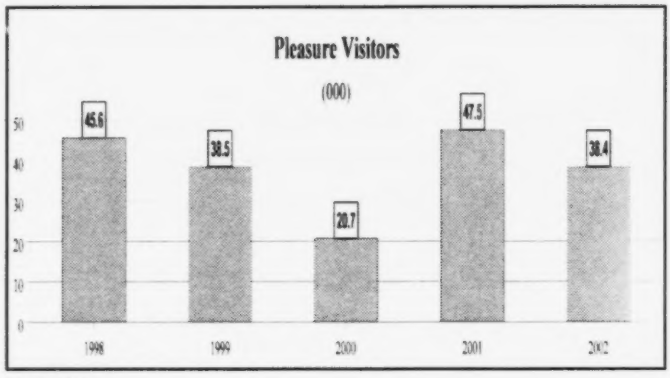


Exhibit 1

Maritime and Ontario origins accounted for 59% of overnight pleasure visitors to the Kensington tourism region in 2002 followed by New England at 12% and Quebec at 9% (Exhibit 2).

	Visitor Origins (Percent of Visitors)			
	1999	2000	2001	2002
Newfoundland	4	4	1	1
Nova Scotia	15	21	25	15
New Brunswick	21	24	15	13
Quebec	4	2	8	9
Ontario	29	15	18	31
Other Canada	7	13	13	6
New England	6	13	10	12
Mid-Atlantic	2	2	4	4
Other US	8	7	5	7
International	4	2	1	2

Exhibit 2

The main travel motives expressed by overnight visitors to the Kensington tourism region included: just to see PEI (32%), VFR (18%) and rest and relaxation (15%) (Exhibit 3). A majority (70%) of overnight visitors to the Kensington tourism region were repeat visitors (Exhibit 4).

Main Travel Motives (Percent of Visitors)	
Just to see PEI	32%
VFR	18%
Personal	14%
Rest, Relaxation	15%
Sightseeing, Touring	12%
Other	9%

Exhibit 3

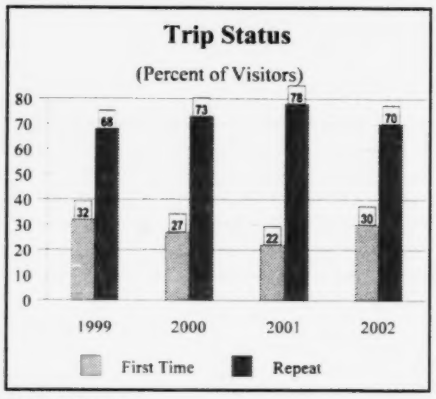


Exhibit 4

In 2002, 76% of overnight visitors to the Kensington tourism region stayed in paid accommodations and 24% overnighted in non-paid accommodations (Exhibit 5).

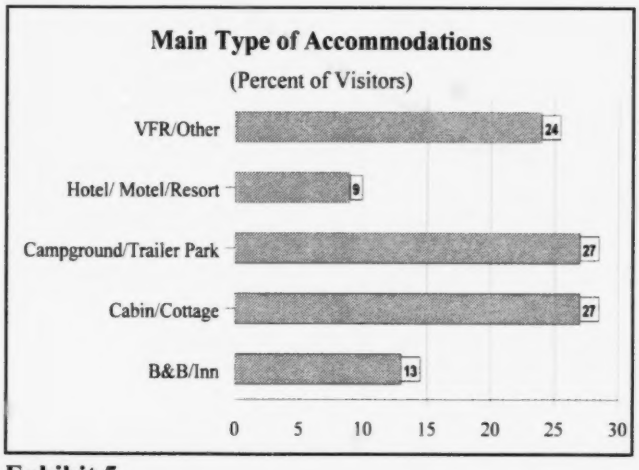


Exhibit 5

Sixty-five percent of visitors who overnighted in the Kensington tourism region made their decision to come to Prince Edward Island more than twelve weeks prior to their departure (Exhibit 6).

In 2002, adult couples accounted for 44% of overnight visitors to the Kensington tourism region, while families with children less than 18 years old accounted for 30% of overnight visitors. Visitors travelling in groups accounted for 16% of visitors and single travellers accounted for the remaining 10% of overnight visitors (Exhibit 7).

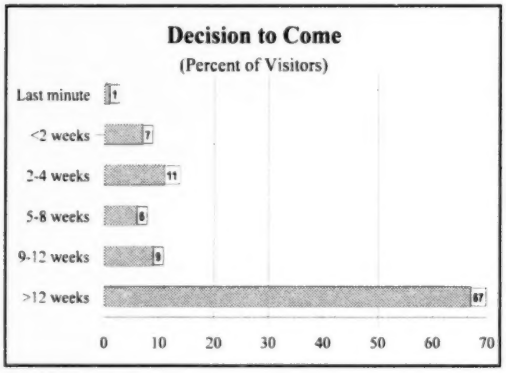


Exhibit 6

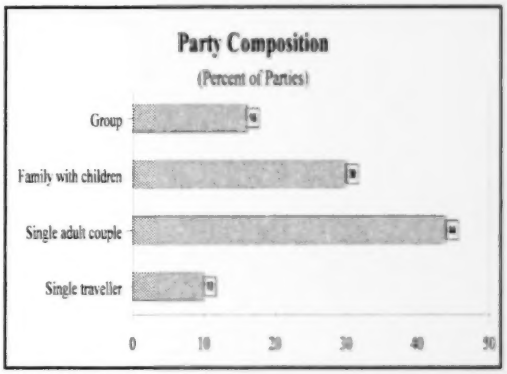
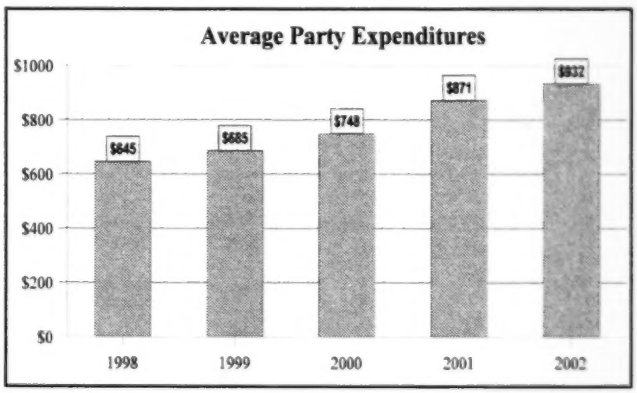


Exhibit 7

Average party expenditures for visitors who overnighted in the Kensington tourism region increased 7% from $871 in 2001 to $932 in 2002 (Exhibit 8). In 2002, three expenditure items, accommodations, restaurant meals and groceries/liquor accounted for 58% of total expenditures (Exhibit 9). It is estimated that total expenditures by visitors who overnighted in the Kensington tourism region was $12.3 million in 2002. *(Please note that all of these expenditures may not have occurred in the main overnight region.)*



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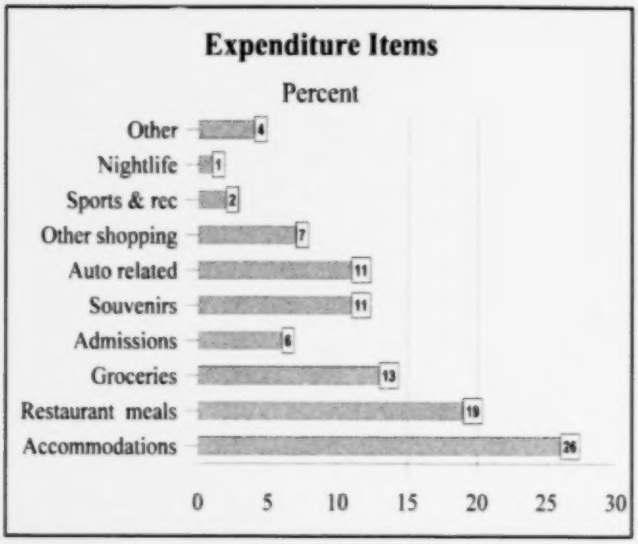


Exhibit 9

The majority (76%) of overnight visitors to the Kensington tourism region were over 40 years of age, 81% had annual household incomes over $50,000 and 65% worked full time. Overnight visitors to the Kensington tourism region spent an average of 7.0 nights in Prince Edward Island (Exhibit 10).

Kensington Overnight Visitor Demographics						
		1998	**1999**	**2000**	**2001**	**2002**
Age	<40 years	26%	40%	29%	24%	26%
	40+ years	74%	60%	71%	76%	74%
Income	<$50,000	33%	41%	36%	31%	19%
	$50,000+	67%	59%	64%	69%	81%
Employment	Full Time	47%	65%	50%	54%	65%
	Retired	31%	22%	30%	33%	22%
	Other	22%	13%	20%	13%	13%
Nights in PEI		5.3	4.8	5.3	7.6	7.0

Exhibit 10

The top ten activities enjoyed by visitors who overnighted in the Kensington tourism region during their Prince Edward Island vacation in 2002 are listed in Exhibit 11.

Kensington Overnight Visitor Activities	
Activity	**Percent of Visitors**
Beach visits	85%
Sightseeing	78%
Souvenir shopping	77%
General merchandise shopping	69%
Driving tours	60%
Visiting friends & relatives	54%
Visiting National Park	48%
Lobster suppers	46%
Visiting Anne attractions	45%
Visiting historical/cultural attractions	42%

Exhibit 11

Section 7. New London Tourism Region

Visitor and economic impact information for this region is based on 17 responses from the 2002 Tourism PEI follow-up telephone survey. With this sample size, there is a 95% level of confidence that values are accurate within a range of +/-23.73%.

Based upon the 2002 follow-up telephone survey of visitors to Prince Edward Island, it is estimated that 0.5% of all pleasure visitors to Prince Edward Island between May 12th and October 31st reported the New London tourism region as their main overnight destination. Visitations to the New London tourism region showed a decrease of 12.9% over the previous four-year average, but an increase of 20.5% over 2001(Exhibit 1).

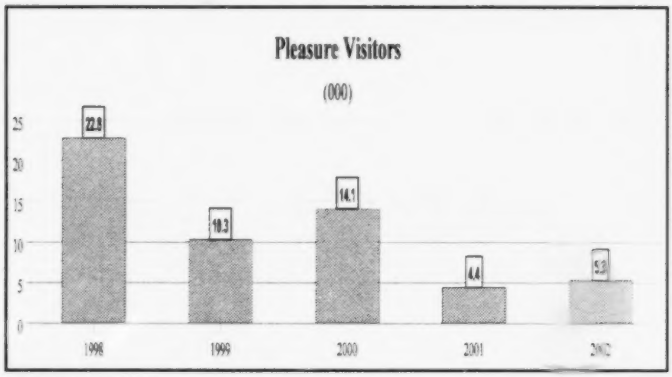


Exhibit 1

Maritime and Quebec origins accounted for 47% of overnight pleasure visitors to the New London tourism region in 2002 followed by Ontario at 14% and Other Canada at 11% (Exhibit 2).

	Visitor Origins (Percent of Visitors)			
	1999	2000	2001	2002
Newfoundland		5	5	4
Nova Scotia	24	36	40	31
New Brunswick	14	8	7	
Quebec	5		20	16
Ontario	33	7		14
Other Canada	5	7	12	11
New England	14	16	10	5
Mid-Atlantic	5	5		9
Other US		6	7	13
International		2		

Exhibit 2

The main travel motives expressed by overnight visitors to the New London tourism region included: just to see PEI (14%), VFR (46%) and rest and relaxation (8%) (Exhibit 3). A majority (65%) of overnight visitors to the New London tourism region were repeat visitors (Exhibit 4).

Main Travel Motives (Percent of Visitors)	
Just to see PEI	14%
VFR	46%
Personal	5%
Rest, Relaxation	8%
Sightseeing, Touring	3%
Other	24%

Exhibit 3

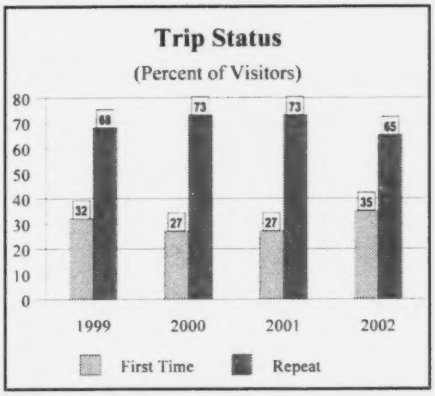


Exhibit 4

In 2002, 66% of overnight visitors to the New London tourism region stayed in paid accommodations and 33% overnighted in non-paid accommodations (Exhibit 5).

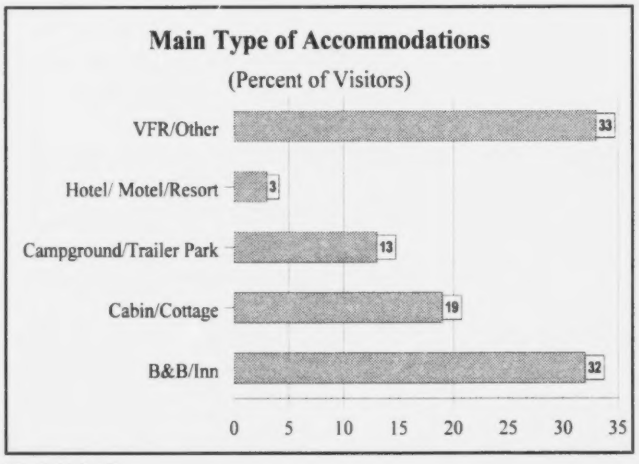


Exhibit 5

Fifty-six percent of visitors who overnighted in the New London tourism region made their decision to come to Prince Edward Island more than twelve weeks prior to their departure (Exhibit 6).

In 2002, families with children less than 18 years old accounted for 35% of overnight visitors, while adult couples accounted for 17% of overnight visitors to the New London tourism region. Visitors travelling in groups accounted for 32% of visitors and single travellers accounted for the remaining 16% of overnight visitors (Exhibit 7).

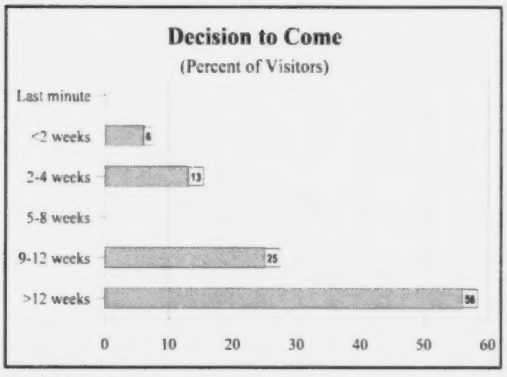


Exhibit 6

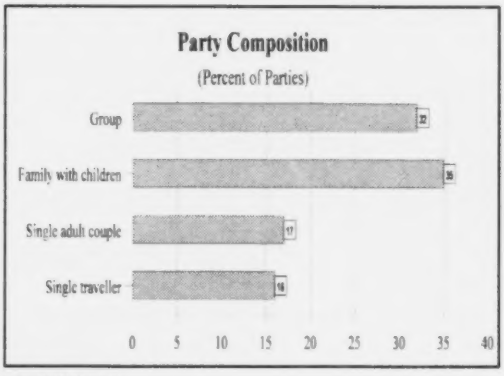


Exhibit 7

Average party expenditures for visitors who overnighted in the New London tourism region decreased 33.3% from $1061 in 2001 to $707 in 2002 (Exhibit 8). In 2002, three expenditure items, accommodations, restaurant meals and souvenir shopping accounted for 62% of total expenditures (Exhibit 9). It is estimated that total expenditures by visitors who overnighted in the New London tourism region was $1.3 million in 2002. *(Please note that all of these expenditures may not have occurred in the main overnight region.)*

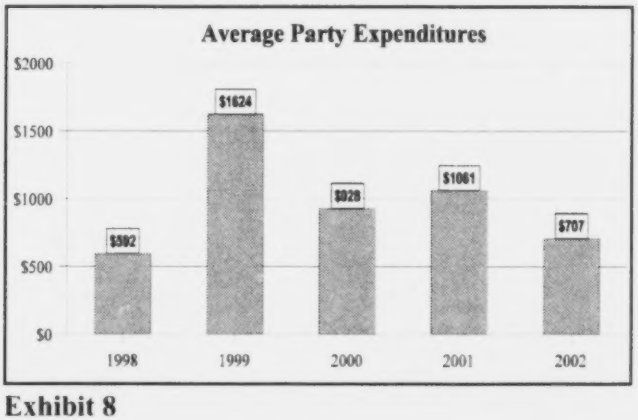


Exhibit 8

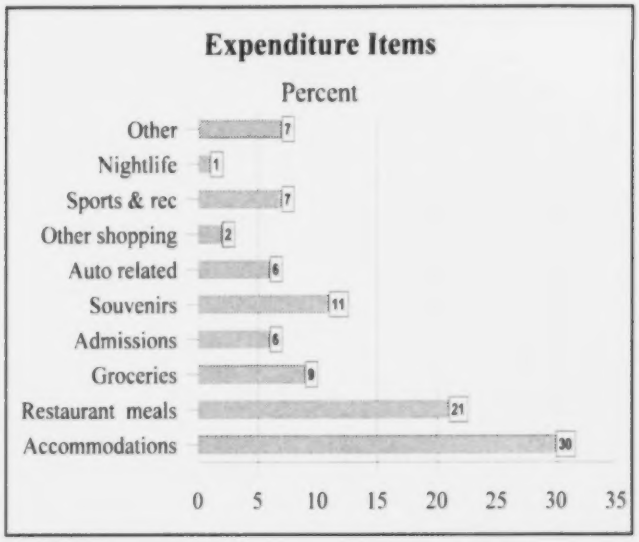


Exhibit 9

The majority (65%) of overnight visitors to the New London tourism region were over 40 years of age, 86% had annual household incomes over $50,000 and 64% worked full time. Overnight visitors to the New London tourism region spent an average of 6.0 nights in Prince Edward Island (Exhibit 10).

New London Overnight Visitor Demographics						
		1998	**1999**	**2000**	**2001**	**2002**
Age	<40 years	26%	29%	41%	30%	35%
	40+ years	74%	71%	59%	70%	65%
Income	<$50,000	41%	34%	29%	33%	14%
	$50,000+	59%	66%	71%	67%	86%
Employment	Full Time	47%	65%	63%	52%	64%
	Retired	20%	14%	10%	30%	18%
	Other	33%	21%	27%	18%	18%
Nights in PEI		7.5	5.3	5.4	7.1	6.0

Exhibit 10

The top ten activities enjoyed by visitors who overnighted in the New London tourism region during their Prince Edward Island vacation in 2002 are listed in Exhibit 11.

New London Overnight Visitor Activities	
Activity	**Percent of Visitors**
Beach visits	74%
Sightseeing	58%
Driving tours	58%
Souvenir shopping	56%
Visiting friends & relatives	51%
Visiting National Park	48%
Lobster suppers	46%
Visiting historical/cultural attractions	39%
Experiencing Acadian cultural	35%
Canada's Birthplace attractions	33%

Exhibit 11

Section 8. Southern Kings Tourism Region

Visitor and economic impact information for this region is based on 179 responses from the 2002 Tourism PEI follow-up telephone survey. With this sample size, there is a 95% level of confidence that values are accurate within a range of +/-7.31%.

Based upon the 2002 follow-up telephone survey of visitors to Prince Edward Island, it is estimated that 5.6% of all pleasure visitors to Prince Edward Island between May 12th and October 31st reported the Southern Kings tourism region as their main overnight destination. Visitations to the Southern Kings tourism region showed a decrease of 21.5% over the previous four-year average (Exhibit 1).

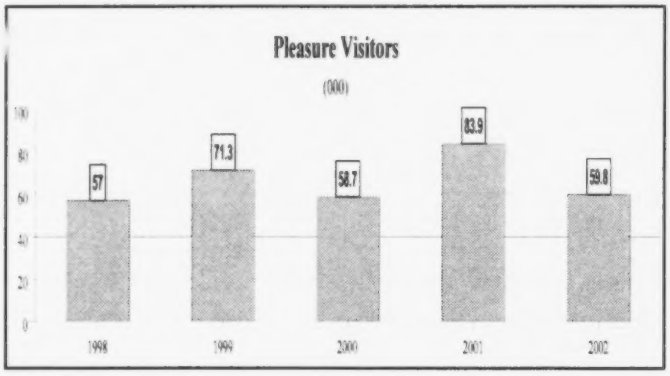


Exhibit 1

Maritime and Ontario origins accounted for 58% of overnight pleasure visitors to the Southern Kings tourism region in 2002 followed by New England at 12% and Other US at 8% (Exhibit 2).

	Visitor Origins (Percent of Visitors)			
	1999	2000	2001	2002
Newfoundland	3	4	3	2
Nova Scotia	27	19	37	30
New Brunswick	4	9	7	6
Quebec	7	7	6	7
Ontario	33	24	23	22
Other Canada	5	11	4	6
New England	7	12	8	12
Mid-Atlantic	4	6	4	5
Other US	8	6	5	8
International	2	2	2	2

Exhibit 2

The main travel motives expressed by overnight visitors to the Southern Kings tourism region included: just to see PEI (27%), VFR (20%) and rest and relaxation (12%) (Exhibit 3). A majority (62%) of overnight visitors to the Southern Kings tourism region were repeat visitors (Exhibit 4).

Main Travel Motives (Percent of Visitors)	
Just to see PEI	27%
VFR	20%
Personal	6%
Rest, Relaxation	12%
Sightseeing, Touring	6%
Other	29%

Exhibit 3

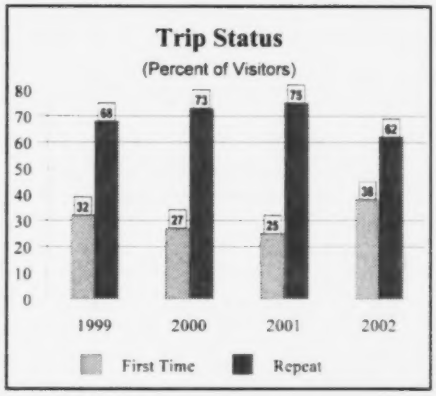


Exhibit 4

In 2002, 75% of overnight visitors to the Southern Kings tourism region stayed in paid accommodations and 25% overnighted in non-paid accommodations (Exhibit 5).

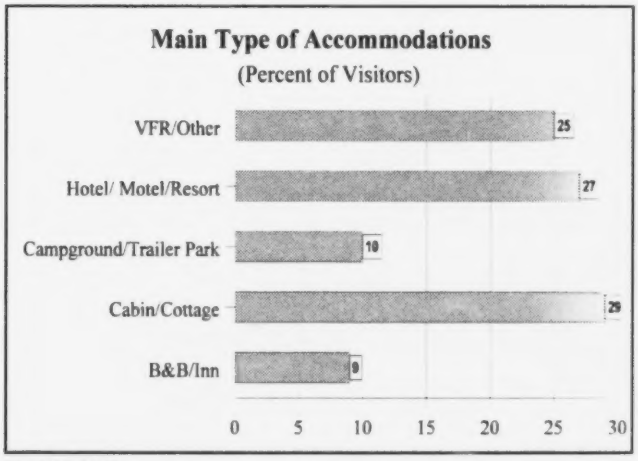


Exhibit 5

Fifty-one percent of visitors who overnighted in the Southern Kings tourism region made their decision to come to Prince Edward Island more than twelve weeks prior to their departure (Exhibit 6).

In 2002, adult couples accounted for 43% of overnight visitors, while families with children less than 18 years old accounted for 24% of overnight visitors to the Southern Kings tourism region. Visitors travelling in groups accounted for 24% of visitors and single travellers accounted for the remaining 9% of overnight visitors (Exhibit 7).

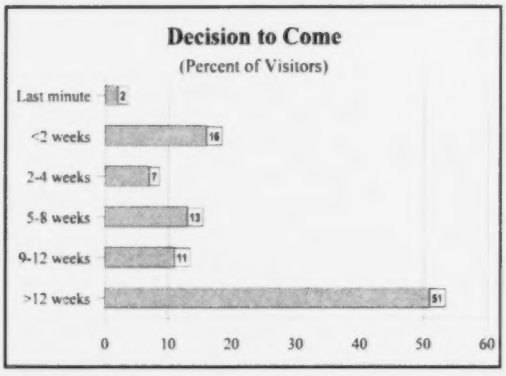


Exhibit 6

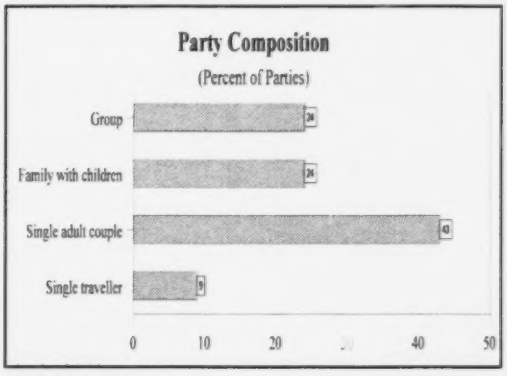
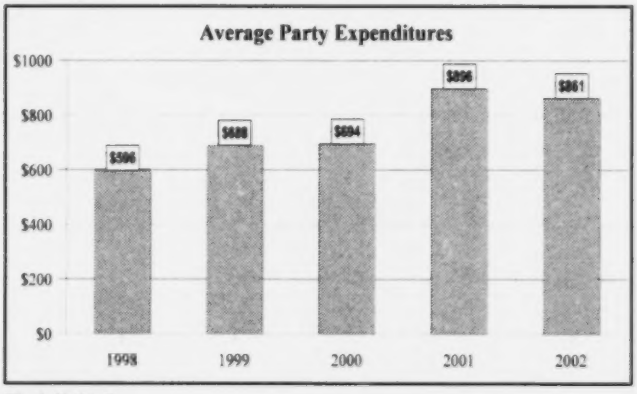


Exhibit 7

Average party expenditures for visitors who overnighted in the Southern Kings tourism region decreased 3.9% from $896 in 2001 to $861 in 2002 (Exhibit 8). In 2002, three expenditure items, accommodations, restaurant meals and groceries/liquor accounted for 65% of total expenditures (Exhibit 9). It is estimated that total expenditures by visitors who overnighted in the Southern Kings tourism region was $18.1 million in 2002. *(Please note that all of these expenditures may not have occurred in the main overnight region.)*



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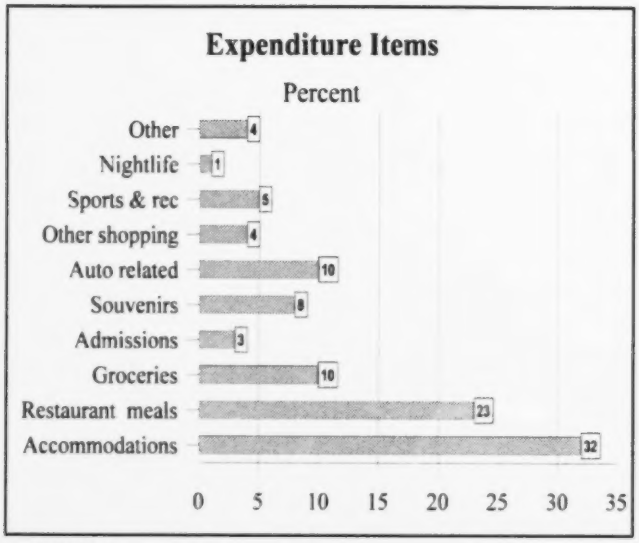

Exhibit 9

The majority (77%) of overnight visitors to the Southern Kings tourism region were over 40 years of age. 73% had annual household incomes over $50,000 and 55% worked full time. Overnight visitors to the Southern Kings tourism region spent an average of 5.4 nights in Prince Edward Island (Exhibit 10).

Southern Kings Overnight Visitor Demographics						
		1998	**1999**	**2000**	**2001**	**2002**
Age	<40 years	27%	29%	25%	20%	23%
	40+ years	73%	71%	75%	80%	77%
Income	<$50,000	28%	35%	38%	31%	27%
	$50,000+	72%	65%	62%	69%	73%
Employment	Full Time	60%	55%	58%	53%	55%
	Retired	27%	18%	22%	28%	26%
	Other	13%	27%	20%	19%	19%
Nights in PEI		4.5	5.4	4.3	5.4	5.4

Exhibit 10

The top ten activities enjoyed by visitors who overnighted in the Southern Kings tourism region during their Prince Edward Island vacation in 2002 are listed in Exhibit 11.

Southern Kings Overnight Visitor Activities	
Activity	**Percent of Visitors**
Sightseeing	74%
Beach visits	65%
Souvenir shopping	61%
General merchandise shopping	52%
Driving tours	51%
Lobster suppers	46%
Visiting National Park	40%
Visiting friends & relatives	39%
Visiting historical/cultural attractions	35%
Golf	33%

Exhibit 11

Section 9. South Shore Tourism Region

Visitor and economic impact information for this region is based on 118 responses from the 2002 Tourism PEI follow-up telephone survey. With this sample size, there is a 95% level of confidence that values are accurate within a range of +/-9.01%.

Based upon the 2002 follow-up telephone survey of visitors to Prince Edward Island, it is estimated that 3.8% of all pleasure visitors to Prince Edward Island between May 12th and October 31st reported the South Shore tourism region as their main overnight destination. Visitations to the South Shore tourism region showed a decrease of 18.6% over the previous four-year average, but an increase of 2% over 2001 (Exhibit 1).

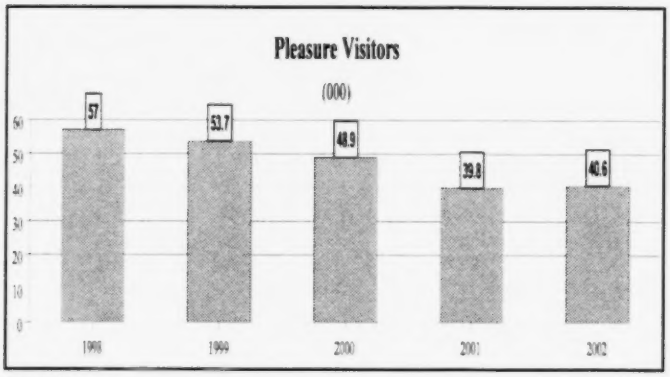

Exhibit 1

Maritime and Ontario origins accounted for 62% of overnight pleasure visitors to the South Shore tourism region in 2002 followed by Other Canada at 8% and Quebec at 7% (Exhibit 2).

	Visitor Origins (Percent of Visitors)			
	1999	2000	2001	2002
Newfoundland	3		1	4
Nova Scotia	21	21	22	20
New Brunswick	9	13	10	11
Quebec	3	4	8	7
Ontario	29	31	27	31
Other Canada	8	7	8	8
New England	9	10	8	5
Mid-Atlantic	3	4	2	4
Other US	12	7	9	7
International	3	1	5	3

Exhibit 2

The main travel motives expressed by overnight visitors to the South Shore tourism region included: just to see PEI (41%), VFR (29%) and rest and relaxation (7%) (Exhibit 3). A majority (68%) of overnight visitors to the South Shore tourism region were repeat visitors (Exhibit 4).

Main Travel Motives (Percent of Visitors)	
Just to see PEI	41%
VFR	29%
Personal	10%
Rest, Relaxation	7%
Sightseeing, Touring	3%
Other	10%

Exhibit 3

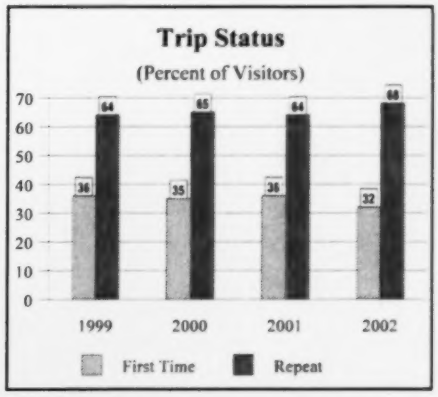

Exhibit 4

In 2002, 79% of overnight visitors to the South Shore tourism region stayed in paid accommodations and 21% overnighted in non-paid accommodations (Exhibit 5).

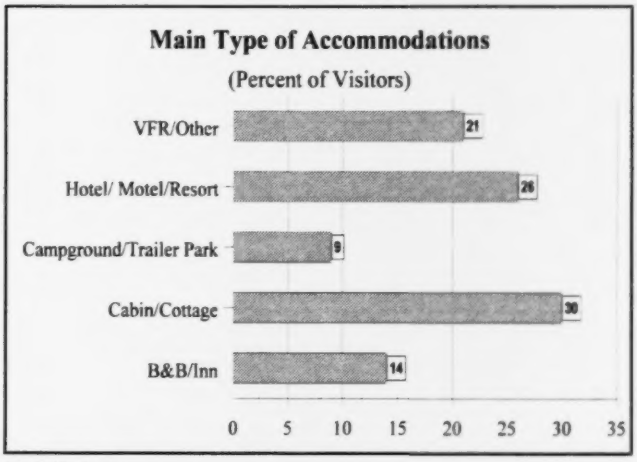

Exhibit 5

Fifty-seven percent of visitors who overnighted in the South Shore tourism region made their decision to come to Prince Edward Island more than twelve weeks prior to their departure (Exhibit 6).

In 2002, adult couples accounted for 42% of overnight visitors, while families with children less than 18 years old accounted for 38% of overnight visitors to the South Shore tourism region. Visitors travelling in groups accounted for 14% of visitors and single travellers accounted for the remaining 6% of overnight visitors (Exhibit 7).

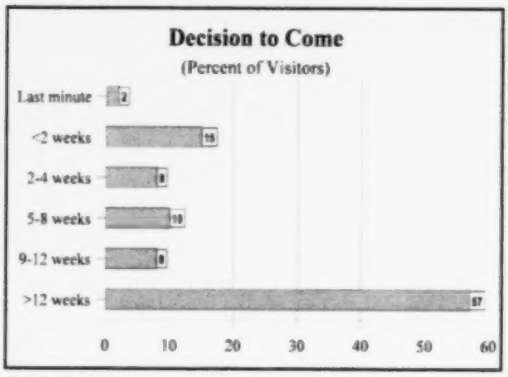

Exhibit 6

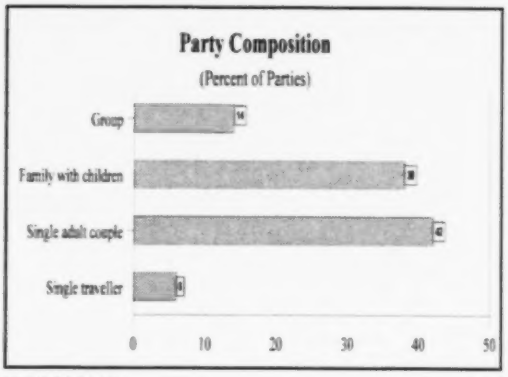

Exhibit 7

Average party expenditures for visitors who overnighted in the South Shore tourism region increased 24.7% from $792 in 2001 to $988 in 2002 (Exhibit 8). In 2002, three expenditure items, accommodations, restaurant meals and groceries/liquor accounted for 63% of total expenditures (Exhibit 9). It is estimated that total expenditures by visitors who overnighted in the South Shore tourism region was $12.6 million in 2002. *(Please note that all of these expenditures may not have occurred in the main overnight region.)*

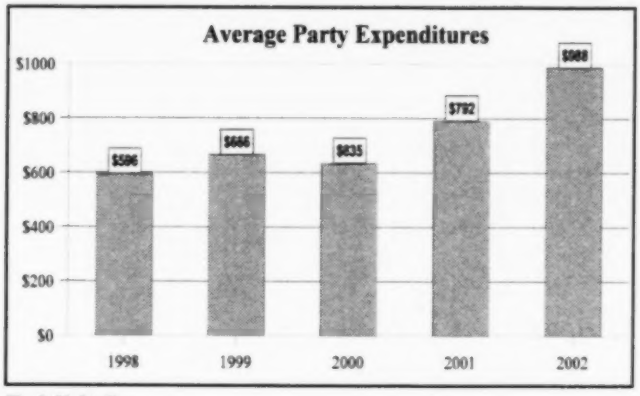

Exhibit 8

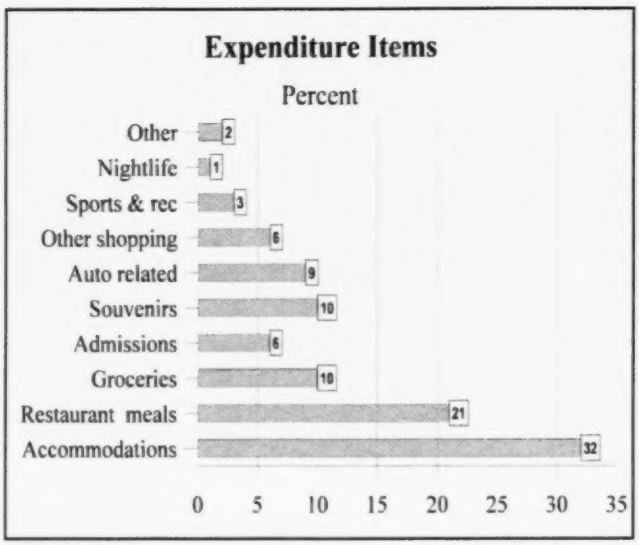

Exhibit 9

The majority (73%) of overnight visitors to the South Shore tourism region were over 40 years of age, 76% had annual household incomes over $50,000 and 58% worked full time. Overnight visitors to the South Shore tourism region spent an average of 5.4 nights in Prince Edward Island (Exhibit 10).

South Shore Overnight Visitor Demographics						
		1998	**1999**	**2000**	**2001**	**2002**
Age	<40 years	19%	31%	20%	30%	27%
	40+ years	81%	69%	80%	70%	73%
Income	<$50,000	46%	35%	42%	39%	24%
	$50,000+	54%	65%	58%	61%	76%
Employment	Full Time	48%	44%	56%	54%	58%
	Retired	34%	28%	22%	27%	27%
	Other	18%	28%	22%	19%	16%
Nights in PEI		5.6	5.4	4.6	7.0	5.4

Exhibit 10

The top ten activities enjoyed by visitors who overnighted in the South Shore tourism region during their Prince Edward Island vacation in 2002 are listed in Exhibit 11.

South Shore Overnight Visitor Activities	
Activity	**Percent of Visitors**
Sightseeing	81%
Beach visits	76%
Souvenir shopping	67%
General merchandise shopping	61%
Driving tours	54%
Visiting National Park	49%
Lobster suppers	47%
Visiting friends & relatives	41%
Visiting historical/cultural attractions	40%
Visiting Anne attractions	39%

Exhibit 11

Section 10. Summerside Tourism Region

Visitor and economic impact information for this region is based on 247 responses from the 2002 Tourism PEI follow-up telephone survey. With this sample size, there is a 95% level of confidence that values are accurate within a range of +/-6.23%.

Based upon the 2002 follow-up telephone survey of visitors to Prince Edward Island, it is estimated that 8% of all pleasure visitors to Prince Edward Island between May 12th and October 31st reported the Summerside tourism region as their main overnight destination. Visitations to the Summerside tourism region showed a decrease of 4.6% over last year and a decrease of 13.6% over the previous four-year average (Exhibit 1).

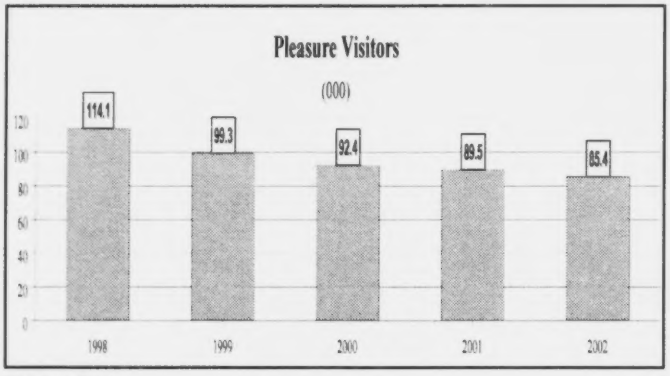

Exhibit 1

Maritime and Ontario origins accounted for 63% of overnight pleasure visitors to the Summerside tourism region in 2002 followed by Other Canada at 10% and New England at 7% (Exhibit 2).

	Visitor Origins (Percent of Visitors)			
	1999	2000	2001	2002
Newfoundland	2	2	3	2
Nova Scotia	26	24	20	20
New Brunswick	9	8	14	13
Quebec	8	6	7	6
Ontario	28	30	25	30
Other Canada	9	10	10	10
New England	8	11	9	7
Mid-Atlantic	3	3	5	3
Other US	6	6	7	7
International	1		1	2

Exhibit 2

The main travel motives expressed by overnight visitors to the Summerside tourism region included: just to see PEI (36%), VFR (29%) and rest and relaxation (7%) (Exhibit 3). A majority (68%) of overnight visitors to the Summerside tourism region were repeat visitors (Exhibit 4).

Main Travel Motives (Percent of Visitors)	
Just to see PEI	36%
VFR	27%
Personal	9%
Rest, Relaxation	7%
Sightseeing, Touring	6%
Other	15%

Exhibit 3

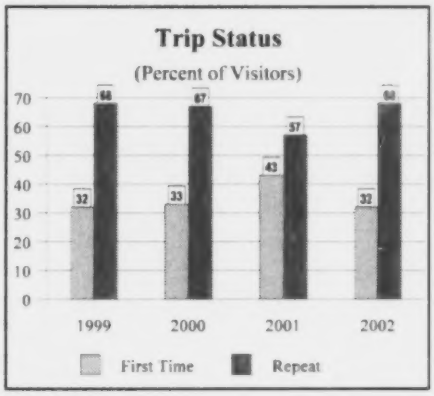

Exhibit 4

In 2002, 77% of overnight visitors to the Summerside tourism region stayed in paid accommodations and 23% overnighted in non-paid accommodations (Exhibit 5).

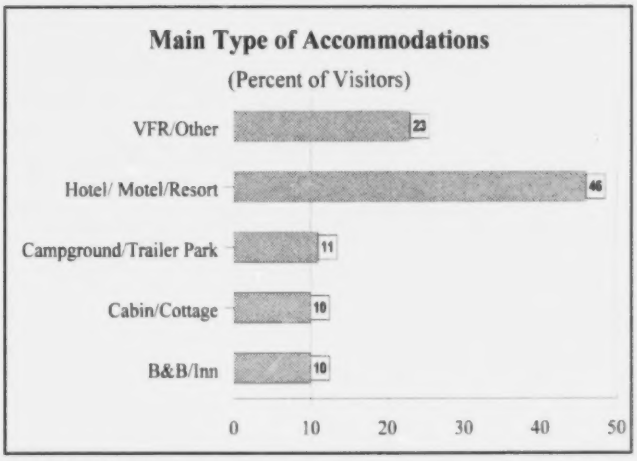

Exhibit 5

Forty-six percent of visitors who overnighted in the Summerside tourism region made their decision to come to Prince Edward Island more than twelve weeks prior to their departure (Exhibit 6).

In 2002, adult couples accounted for 51% of overnight visitors, while families with children less than 18 years old accounted for 23% of overnight visitors to the Summerside tourism region. Visitors travelling in groups accounted for 19% of visitors and single travellers accounted for the remaining 7% of overnight visitors (Exhibit 7).

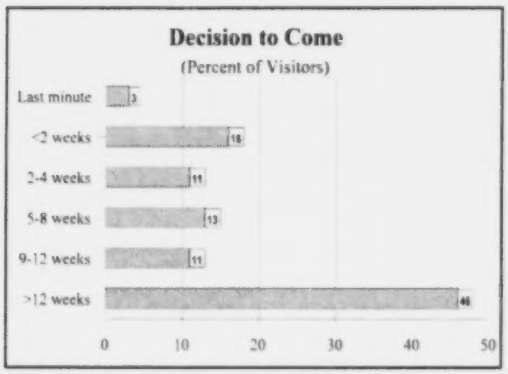

Exhibit 6

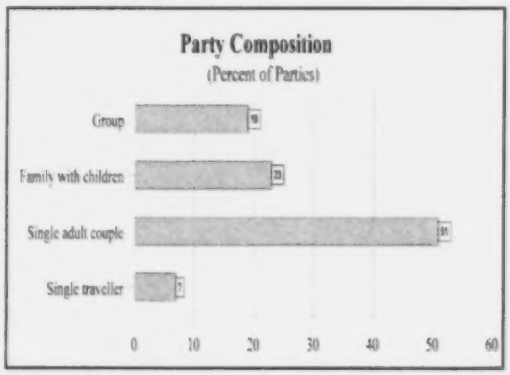

Exhibit 7

Average party expenditures for visitors who overnighted in the Summerside tourism region increased 14.8% from $662 in 2001 to $760 in 2002 (Exhibit 8). In 2002, three expenditure items, accommodations, restaurant meals and souvenir shopping accounted for 65% of total expenditures (Exhibit 9). It is estimated that total expenditures by visitors who overnighted in the Summerside tourism region was $25.2 million in 2002. *(Please note that all of these expenditures may not have occurred in the main overnight region.)*

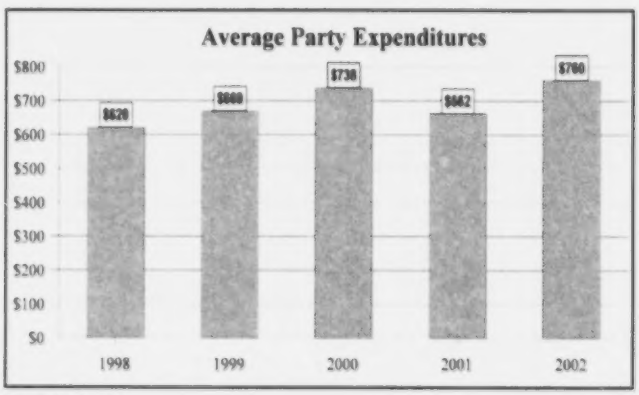

Exhibit 8

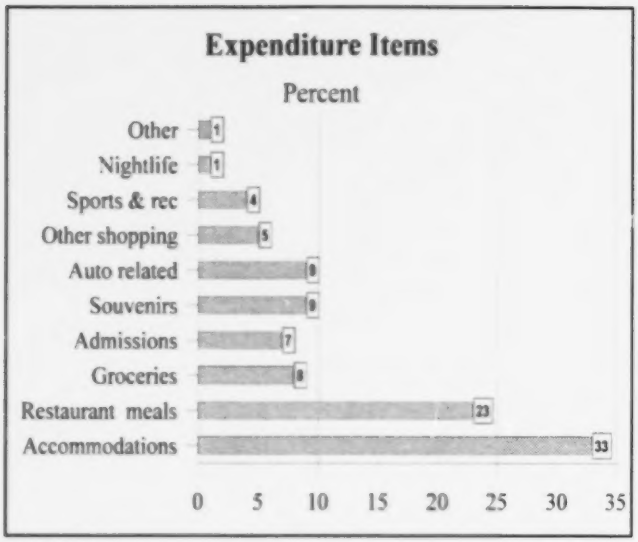

Exhibit 9

The majority (77%) of overnight visitors to the Summerside tourism region were over 40 years of age, 66% had annual household incomes over $50,000 and 53% percent worked full time. Overnight visitors to the Summerside tourism region spent an average of 4.7 nights in Prince Edward Island (Exhibit 10).

Summerside Overnight Visitor Demographics						
		1998	**1999**	**2000**	**2001**	**2002**
Age	<40 years	18%	25%	28%	24%	23%
	40+ years	82%	75%	72%	76%	77%
Income	<$50,000	42%	40%	31%	44%	34%
	$50,000+	58%	60%	69%	56%	66%
Employment	Full Time	56%	52%	60%	55%	53%
	Retired	34%	32%	20%	27%	32%
	Other	10%	16%	20%	18%	15%
Nights in PEI		4.4	4.6	4.2	4.3	4.7

Exhibit 10

The top ten activities enjoyed by visitors who overnighted in the Summerside tourism region during their Prince Edward Island vacation in 2002 are listed in Exhibit 11.

Summerside Overnight Visitor Activities	
Activity	**Percent of Visitors**
Sightseeing	85%
Souvenir shopping	72%
Beach visits	66%
Driving tours	57%
General merchandise shopping	54%
Visiting friends & relatives	44%
Visiting National Park	43%
Lobster suppers	40%
Visiting historical/cultural attractions	38%
Visiting Anne attractions	36%

Exhibit 11

Section 11. West Prince Tourism Region

Visitor and economic impact information for this region is based on 110 responses from the 2002 Tourism PEI follow-up telephone survey. With this sample size, there is a 95% level of confidence that values are accurate within a range of +/-9.33%.

Based upon the 2002 follow-up telephone survey of visitors to Prince Edward Island, it is estimated that 3.4% of all pleasure visitors to Prince Edward Island between May 12th and October 31st reported the West Prince tourism region as their main overnight destination. Visitations to the West Prince tourism region showed a decrease of 19.9% over last year and a decrease of 12.7% over the previous four-year average (Exhibit 1).

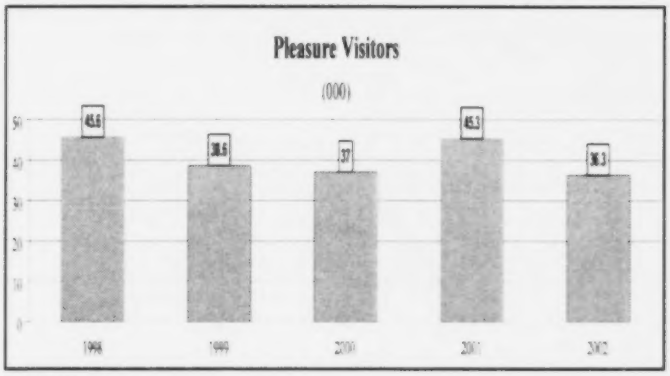

Exhibit 1

Maritime and Ontario origins accounted for 55% of overnight pleasure visitors to the West Prince tourism region in 2002 followed by New England at 15% and Other US at 10% (Exhibit 2).

	Visitor Origins (Percent of Visitors)			
	1999	2000	2001	2002
Newfoundland	3	1	1	2
Nova Scotia	6	21	22	16
New Brunswick	11	19	12	12
Quebec	5	7	4	6
Ontario	46	22	30	27
Other Canada	5	6	6	5
New England	11	13	13	15
Mid-Atlantic	5	7	4	3
Other US	5	4	5	10
International	4		3	4

Exhibit 2

The main travel motives expressed by overnight visitors to the West Prince tourism region included: VFR (35%), just to see PEI (27%) and rest and relaxation (11%) (Exhibit 3). A majority (67%) of overnight visitors to the West Prince tourism region were repeat visitors (Exhibit 4).

Main Travel Motives (Percent of Visitors)	
Just to see PEI	27%
VFR	35%
Personal	14%
Rest, Relaxation	11%
Sightseeing, Touring	4%
Other	9%

Exhibit 3

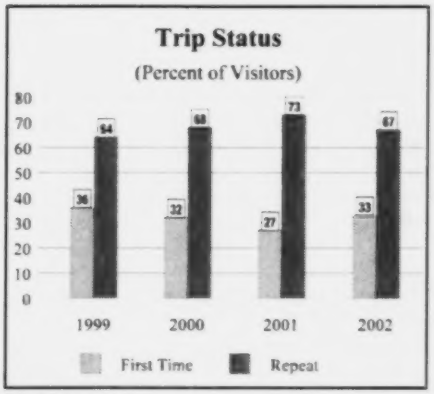

Exhibit 4

In 2002, 56% of overnight visitors to the West Prince tourism region stayed in paid accommodations and 44% overnighted in non-paid accommodations (Exhibit 5).

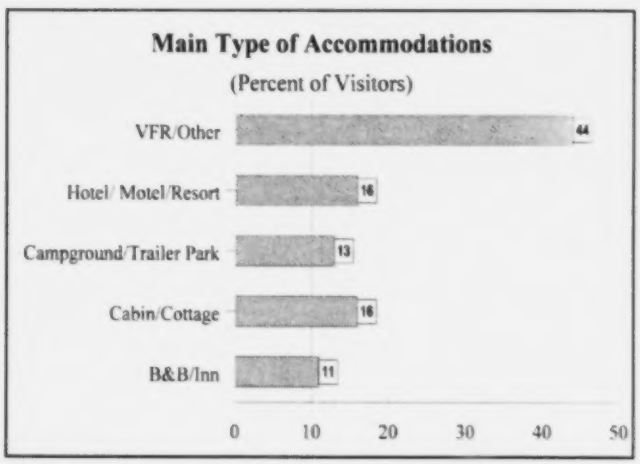

Exhibit 5

Thirty-nine percent of visitors who overnighted in the West Prince tourism region made their decision to come to Prince Edward Island more than twelve weeks prior to their departure (Exhibit 6).

In 2002, adult couples accounted for 45% of overnight visitors, while families with children less than 18 years old accounted for 28% of overnight visitors to the West Prince tourism region. Visitors travelling in groups accounted for 16% of visitors and single travellers accounted for the remaining 11% of overnight visitors (Exhibit 7).

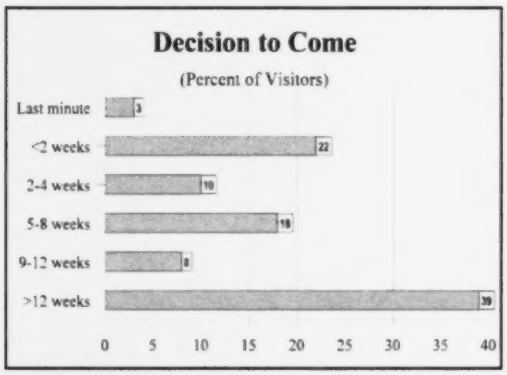

Exhibit 6

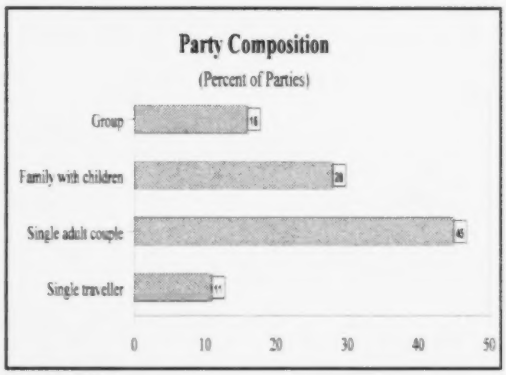

Exhibit 7

Average party expenditures for visitors who overnighted in the West Prince tourism region decreased 17.4% from $889 in 2001 to $734 in 2002 (Exhibit 8). In 2002, three expenditure items, accommodations, restaurant meals and auto related accounted for 64% of total expenditures (Exhibit 9). It is estimated that total expenditures by visitors who overnighted in the West Prince tourism region was $9.5 million in 2002. *(Please note that all of these expenditures may not have occurred in the main overnight region.)*

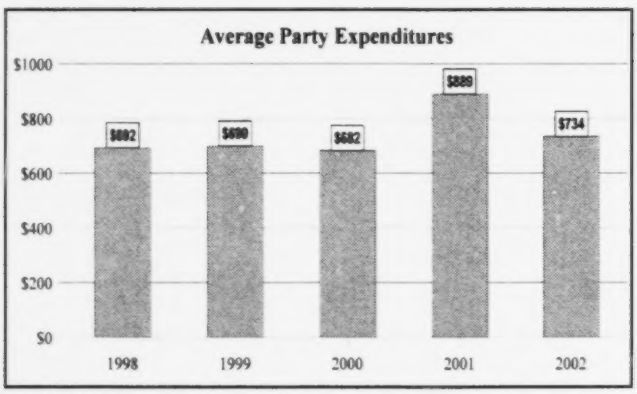

Exhibit 8

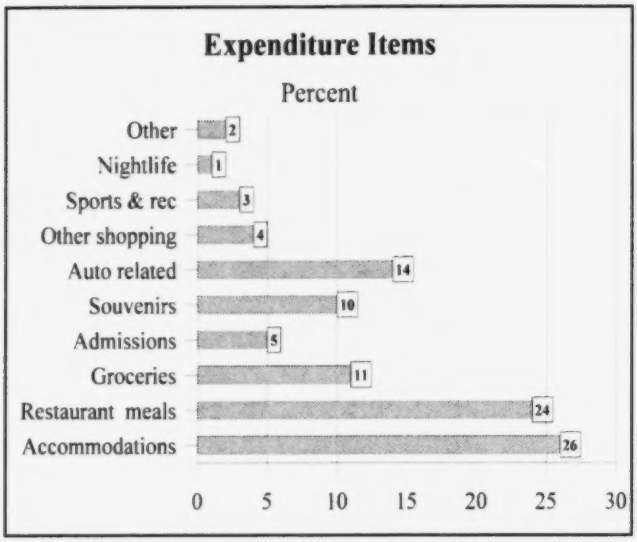

Exhibit 9

The majority (74%) of overnight visitors to the West Prince tourism region were over 40 years of age, 65% had annual household incomes over $50,000 and 62% worked full time. Overnight visitors to the West Prince tourism region spent an average of 5.5 nights in Prince Edward Island (Exhibit 10).

West Prince Overnight Visitor Demographics						
		1998	**1999**	**2000**	**2001**	**2002**
Age	<40 years	18%	23%	42%	24%	26%
	40+ years	82%	77%	58%	76%	74%
Income	<$50,000	50%	34%	33%	44%	35%
	$50,000+	50%	66%	67%	56%	65%
Employment	Full Time	56%	53%	57%	55%	62%
	Retired	30%	29%	29%	27%	25%
	Other	14%	18%	14%	18%	13%
Nights in PEI		6.6	7.3	4.6	6.4	5.5

Exhibit 10

The top ten activities enjoyed by visitors who overnighted in the West Prince tourism region during their Prince Edward Island vacation in 2002 are listed in Exhibit 11.

West Prince Overnight Visitor Activities	
Activity	**Percent of Visitors**
Sightseeing	78%
Beach visits	67%
Souvenir shopping	67%
Driving tours	61%
General merchandise shopping	59%
Visiting friends & relatives	54%
Visiting National Park	47%
Visiting historical/cultural attractions	38%
Lobster suppers	38%
Visiting Anne attractions	32%

Exhibit 11